

Requirements Document

ESI

Azure Stack Foundation – Variant I (Small)

Two Workstreams

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Introduction

Microsoft Azure Stack Hub, herein referred to as Azure Stack, is an extension of the Azure hyperscale cloud that brings compute power closer to the data either on-premises or in a tactical environment. Azure Stack enables organizations to leverage a hybrid, cloud computing architecture even when extending services to disconnected, intermittent connection, or limited bandwidth environments—a common scenario within the Department of Defense (DoD).

The ESI Azure Stack Foundation (ASF) - Small offering features service modules that can be adapted to an organization's operational requirements. It includes core deliveries that support post-deployment integration planning and operations. This offering is for customers who are new to Azure Stack looking to get core Azure Stack education and hands-on experience to plan and set a minimum viable product and understand Azure Stack's operational model. To establish hybrid connectivity or prepare the Azure Stack for hybrid workloads, it is recommended that the customer uses either the Medium or Large variant of this offering.

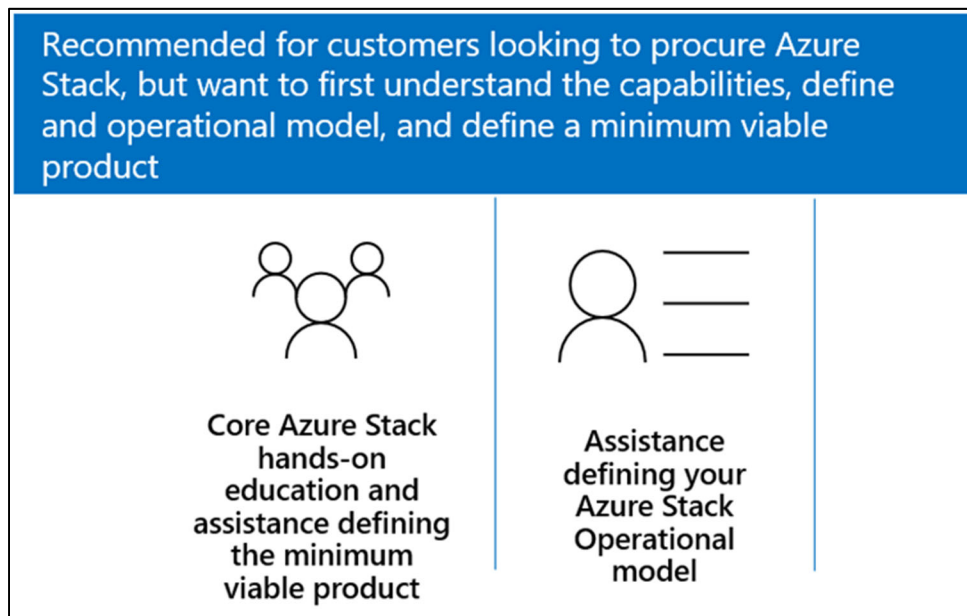
The goals for the Azure Stack Foundation Offering are to:

- Prepare organizations to capitalize on hybrid cloud opportunities with Azure and Azure Stack; and
- Provide hands-on education to help organizations operate and deploy workloads on Azure Stack.

1. Project Objectives and Scope

1.1. Objectives

The objectives of this project are listed for each workstream in the following graphic and table.



Workstream	Objectives
Azure Stack Foundation Core	Assist an organization in understanding Azure Stack capabilities, including the technical and business considerations required to integrate the Solution into your datacenter.
Azure Stack Operations	This workstream is focused on establishing an operations model for Azure Stack.

1.2. Areas in Scope

This section outlines the work and activities required to accomplish the objectives set forth in this Requirements Document.

1.2.1. General Project Scope

Microsoft will provide Services in support of the following scope:

Area	Description	Assumptions
Azure Stack Foundation Core	Two weeks-long workstream with education and “hands-on” sessions to help an organization understand the breadth of Azure Stack and support them to configure a minimum viable product.	The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope. An Azure Stack Development Kit instance has already been deployed by the organization.
Azure Stack Operations	A week-long workstream, during which Microsoft will support the organization as it builds its Azure Stack service map and a responsible, accountable, consulting, informed (RACI) model that defines its tenant management, monitoring, Business Continuity and Disaster Recovery (BCDR), and patch management operations.	The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope.

1.2.2. Software Products and Technologies

The products and technology listed in the following table are required for project execution. The party responsible for obtaining the items is indicated.

Product and Technology Item	Version	Responsibility	Ready by
Azure Subscription	Not applicable	Customer	Start of Plan phase
Azure Stack and Original Equipment Manufacturer (OEM) Build	Latest build	Customer	Start of Plan phase

1.2.3. Environments

The following environments will be required to deliver the project:

Environment	Location	Responsibility (Setup)	Ready by
Azure	Customer-selected Azure region	Customer	Start of Plan phase
A Deployed and Certified OEM Azure Stack SKU	Customer's on-premises datacenter	Customer	Start of Plan phase
Azure Stack Development Kit–Supported Hardware	Customer's on-premises datacenter	Customer	Start of Plan phase
Production	Azure/on-premises	Customer	2 weeks prior to go-live

1.2.4. Testing and Defect Remediation

Testing

The following testing is included in the scope of the project:

Test Type (Environment)	Description	Responsibility for Providing:			
		Test Execution	Data	Test Cases	Guidance / Support
Unit Testing (Azure Stack)	Automated unit testing for each build, focusing on determining if a unit of code functions as intended.	Microsoft	Microsoft	Microsoft	Customer
Hybrid Pattern Testing	Scenario testing for the selected hybrid pattern.	Microsoft	Microsoft	Microsoft	Customer

Defect Remediation

The following priorities are defined for defect remediation:

Priority	Description	Remediation in Scope?
P1	Blocking Defect Development, testing, or production launch cannot proceed until this type of defect is corrected. A defect of this type blocks further progress in this area. The solution cannot ship, and the project team cannot achieve the next milestone until such a defect is corrected.	Yes
P2	Significant Defect The Defect must be fixed prior to moving to production. Such a defect, however, will not affect test plan implementation.	Yes

Priority	Description	Remediation in Scope?
P3	Important Defect The Defect is important to correct, however, it is possible to move forward into production using a workaround. <i>*Note: The defect will be logged. Remediation will be performed through an agreed-upon change request only.</i>	No*
P4	Enhancements and Cosmetic Defects Feature enhancement and cosmetic defects, which include design requests that vary from original concepts. <i>*Note: The defect will be logged. Remediation will be performed through an agreed-upon change request only.</i>	No*

1.3. Areas Out of Scope

Any area not explicitly included in the Areas in Scope section is out of scope for Microsoft during this project. Areas out of scope for this project, include the following.

Area	Description
Product Licenses and Subscriptions	Product licenses (Microsoft or non-Microsoft) and cloud service subscriptions are not included, unless otherwise noted in section "Software Products and Technologies."
Hardware	Microsoft will not provide hardware for this project.
Implementation of the Azure Stack Development Kit for Production Workloads	Implementation of the Azure Stack Development Kit, which is a nonproduction, single-node instance of Azure Stack that supports development and test activities for application developers and enterprise administrators, is out of scope. While Solutions and integration can be modeled, designed, and developed using this platform, Microsoft does not support running production workloads on Azure Stack Development Kit installations.
Third-Party Hybrid Connectivity Network Virtual Appliances	There are third-party solutions available to establish hybrid connectivity between the Azure Stack stamp and remote locations. These network virtual appliances are not supported by Microsoft and the deployment and configuration of these solutions must be done by the Customer.
Active Directory Configuration	Configuration of Active Directory Domain Services (AD DS) and Azure Active Directory, beyond that which is explicitly required to support Azure integration, is out of scope.
Custom Automation Development	Creation of automation or scripts for deployment, management, or other purposes is out of scope. Microsoft might share sample automation or scripts to use as a reference. Any extension or customization of this code, however, is out of scope.

Area	Description
Integration with Third-Party Software	Microsoft will not be responsible for integration with third-party software.
Data Migration	Data migration activities are not in scope for this project.
System Integration	System integration and interfaces are not in scope for this project.
Product Bugs and Upgrades	Product upgrades, bugs, and design change requests for Microsoft products are not in scope for this project.
Source Code Review	The Customer will not provide Microsoft with access to non-Microsoft source code or source code information. For any non-Microsoft code, Microsoft Services will be limited to the analysis of binary data, such as a process dump or network monitor trace.
Process Reengineering	Designing functional business components of the solution is not included.
Organizational Change Management	Designing—or redesigning—the Customer’s functional organization is not included.
Certification and Accreditation	Customer regulatory compliance certification and accreditation activities outside of general support for existing Customer processes is out of scope.

2. Project Approach, Timeline, and Deliverable Acceptance

2.1. Approach

The project will be structured following the Microsoft solution delivery methodology across three distinct phases: Envision, Plan/Build, and Closure. Each phase has distinct activities and deliverables that are described in the following sections. When activities and deliverables are complete, the phase is considered complete.

If a deliverable requires formal review and acceptance (a process described in the

Deliverable Acceptance Process section), this is indicated in the following sections. Otherwise, the deliverables are accepted “upon delivery” and do not require formal acceptance.



2.1.1. Engagement Initiation


Before beginning the project and dispatching resources, the following prerequisites must be completed, remotely where applicable.

Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<ul style="list-style-type: none"> • Conduct an initiation call to commence team formation and communicate expectations; • Document the project launch prerequisites using input from this Requirements Document; • Track the status of prerequisites and adjust the engagement initiation phase start date accordingly; and • Conduct a detailed walk-through of the Requirements Document with the Customer in order to agree on an initial project schedule and approach.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> • Attend and participate in the initiation call; • Assign responsibilities for project initiation and launch prerequisites to accountable customer resources and establish target completion dates; • Complete the project initiation and launch prerequisites; • Staff the project with the required Customer resources in the time frames that were agreed upon in the initiation call; and • Customer networking staff will be responsible for external networking configuration.

2.1.2. Envision Phase

During the Envision phase, the teams (Microsoft and the Customer) will reach agreement on a shared vision for the project, including verification of the identified scope, activities and assumptions required to realize the vision.


Module 1: Azure Stack Foundation Core

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<ul style="list-style-type: none"> • Lead a formal project kickoff meeting to begin onsite activities; and • Create a mutually agreed-upon vision and scope.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> • Verify that prerequisites that connect the Customer datacenter to Azure have been met; • Procure a non-trial Azure subscription or verify that an Azure enrollment is in place; • Determine and coordinate key personnel availability; and • Participate in the service kickoff meeting.
Key Assumptions	N/A

Deliverables

Name	Description	Acceptance Required?	Responsibility
Vision and Scope Document	The vision and scope document for the Azure Stack Foundation Core module consists of: <ul style="list-style-type: none"> The agreement between the team and customer reached on the desired solution; and The overall project direction. 	No	Microsoft
Azure Stack Foundation Kickoff Presentation	A presentation that summarizes the overall engagement activities,	No	Microsoft

Module 2: Azure Stack Operations

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<ul style="list-style-type: none"> Kick off the Azure Stack Operations engagement; Share the Modern Service Management Visions and what is in store for Azure Stack Operations; Validate the schedule for the rest of the delivery; and Set Customer expectations.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> Determine and coordinate key personnel availability; and Participate in the service kickoff meeting.
Key Assumptions	N/A

Deliverables


Name	Description	Acceptance Required?	Responsibility
None	N/A	N/A	N/A

2.1.3. Plan and Build

During the Plan phase, the team will develop a detailed plan for the project that includes a list of activities that are to be completed, and the project schedule. In the Build phase, the team will assist the Customer with hands-on training and in-scope modules.

Module 1: Azure Stack Foundation Core


The Plan and Build phases are focused on educating the Customer on infrastructure aspects of Azure Stack and working with the Customer to either build the expected configuration of its multimodal Azure Stack system (or systems) or by modeling the expected configuration using an Azure Stack Development Kit instance.

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	The following topics will be covered by the consultant during the Plan and Build phases: <ul style="list-style-type: none"> • Azure Stack governance; • Azure Stack billing; • Azure Stack infrastructure as a service IaaS; • Azure Stack platform as a service; • Azure Stack DevOps introduction; • Azure Stack support; and • Azure Stack deployment patterns.
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> • Participate in the educational sessions; • Make or confirm design decisions about the configuration of the production Azure Stack; and • Participate in the implementation of the Azure Stack configuration that is based on accepted design decisions. The configuration will either be implemented in the deployed Azure Stack multimodal scale units or into a development or test environment through the use of an Azure Stack Development Kit server (this server would be provided by the Customer).
Key Assumptions	<ul style="list-style-type: none"> • The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope. • An Azure Stack Development Kit instance has already been deployed by the Customer.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Design Decision Spreadsheet	A Microsoft Excel spreadsheet that describes the Azure Stack–related design and configuration decisions made during this phase of the engagement.	No	Microsoft

Module 2: Azure Stack Operations

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	Microsoft will also conduct a set of interactive educational sessions, focused on Azure Stack Operations, including: <ul style="list-style-type: none"> • The Azure Stack service map; • The Azure Stack service description; • The Azure Stack RACI model; • The Azure Stack monitoring; • The Azure Stack tenant management; • The Azure Stack backup and restore; • The Azure Stack patch and update; • The Azure Stack capacity management; and • The Azure Stack operational tasks.
Customer Activities (The activities to be performed by the Customer.)	The Customer will participate in the workshops to refine the operational practices related to Azure Stack.
Key Assumptions	Azure Stack operational teams will be able to participate in the workshops and make decisions about how to operate Azure Stack.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Stack Service Map	A Microsoft Visio diagram that depicts the Azure Stack environment and its corresponding dependencies.	No	Microsoft
Azure Stack Service Description	A Word Document with a service description of Azure Stack and a definition of the Customer requirements of the service.	No	Microsoft
Azure Stack RACI Model	An Excel spreadsheet that provides an overview of the roles and responsibilities needed to manage and support Azure.	No	Microsoft
Azure Stack Operational Tasks	An Excel spreadsheet that outlines the daily, weekly, monthly, and specific tasks needed to manage Azure Stack.	No	Microsoft

2.1.4. Closure

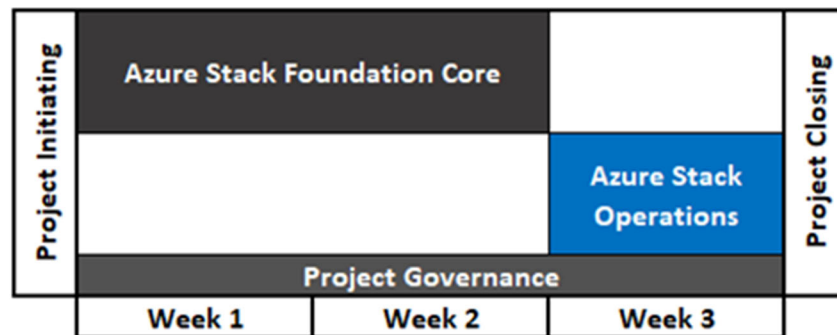
During the Closure phase, the team will close the project and will discuss possible next steps, based on the lessons learned during the Plan and **Error! Reference source not found.** phases. The closeout meeting will be completed after all modules in the Plan and Build phases have been completed.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Stack Foundation Core Executive Summary	PowerPoint presentation with the Azure Stack Foundation Core module executive summary.	No	Microsoft

2.2. Timeline

During project planning, a detailed timeline will be developed. The timeline below is a high-level representation, all dates, and durations are relative to the project start date and are estimates only. If the project timeline changes significantly, a Change Request may be issued following the Change Management Process. The total duration of ESI Azure Stack Foundation (ASF) – Small Offering is 3 weeks.



2.3. Deliverable Acceptance Process

Microsoft has **no** specific service deliverables requiring formal acceptance.

2.4. Project Governance

The governance structure and processes the team will adhere to for the project are described in the following sections:

2.4.1. Project Communications

The following will be used to communicate during the project:

- **Communications Plan:** This document will describe the frequency, audience, and content of communication with the team and stakeholders. It will be developed by Microsoft and the Customer as part of project planning.
- **Status Reports:** The Microsoft team will prepare and issue regular status reports to project stakeholders per the frequency defined in the communication plan.
- **Status Meetings:** The Microsoft team will schedule regular status meetings, per the frequency defined in the communication plan, to review the overall project status, the acceptance of deliverables, and review open issues and risks.

2.4.2. Risk and Issue Management

The following general procedure will be used to manage active project issues and risks during the project:

- **Identify:** Identify and document project issues and risks (potential issues that could affect the project);
- **Analyze and Prioritize:** Assess the potential impact and determine the highest priority risks and issues that will be actively managed;
- **Plan and Schedule:** Determine the strategy for managing priority risks and issues and identify a resource who can take responsibility for mitigation and remediation;
- **Track and Report:** Monitor and report the status of risks and issues;
- **Escalate:** Escalate to project sponsors the high impact issues and risks that the team is unable to resolve; and
- **Control:** Review the effectiveness of risk and issue management actions.

Active issues and risks will be regularly monitored during the project.

2.4.3. Change Management Process (Contract Modification)

During the project, either party may request in writing, modifications to the scope of services described with in this requirement document. Approved modifications will be managed through the contracting office and could lead to additional costs and schedule impacts. These modifications only take effect when the proposed modification is agreed upon by all parties via a Contracting Officer approved task order modification. The modification management process steps are:

All modification requests will be documented in a mutually agreeable format (modification request form). Microsoft or Customer identified modifications will be submitted to the Contracting Officer. All modification requests must include:

- A description of the modification; and
- The estimated effect of implementing the modification including impact on the project scope, schedule, and labor.

The Contracting Officer will then work with the customer and Microsoft to determine if the modification is within scope of the task order as well as ESI and, if applicable, execute a task order modification.

Any delays due to Customer dependencies or deliverables which may impact project schedule, effort, and cost will be managed by the process outlined in this section.

Microsoft shall have no obligation to commence work in connection with any modification until the details of the modification are approved by the Contracting Officer in a task order modification.

2.4.4. Escalation Path

The Microsoft project manager will work closely with the Customer project manager, sponsor, and other designees to manage project issues, risks, and change requests as described previously. The Customer will provide reasonable access to the sponsor or sponsors to expedite resolution. The standard escalation path for review, approval, or dispute resolution is as follows:

- Project team member (Microsoft or the Customer)
- Project manager (Microsoft and the Customer)
- Microsoft delivery manager
- Microsoft and the Customer project sponsor

2.5. Project Completion

Microsoft will provide services defined in this Requirements Document. If additional services are required, the Change Management Process will be followed and the contract modified. The project will be considered complete when at least one of the following conditions has been met:

- All Microsoft in-scope tasks have been completed.
- The period of performance (Term) of the project has expired.
- The task order for the project is terminated pursuant to the provisions of the base contract.

3. Project Organization

3.1. Project Roles and Responsibilities

The key project and leadership roles and the responsibilities are as follows.

Customer

Role	Responsibilities
Project Sponsor	<ul style="list-style-type: none"> • Is available 30-40 hours a week, but full time at project start and end; • Services part time throughout; • Makes key project decisions as needed; and • Serves as a point of escalation to support clearing project roadblocks.
Project Manager	<ul style="list-style-type: none"> • Is available full time, 30-40 hours a week, throughout project; • Serves as the primary point of contact for the Microsoft team; • Manages the overall project; • Delivers the project on schedule; • Takes responsibility for Customer resource allocation, risk management, and project priorities; and • Communicates with executive stakeholders.
Technical Team Lead	<ul style="list-style-type: none"> • Is available full time, 40 hours a week, throughout project; • Serves as the primary technical point of contact; • Coordinates efforts with the other technical leads; and • Coordinates the implementation activities across all workstreams.

Role	Responsibilities
Lead Business Analyst	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary functional point of contact for the team that is responsible for functional business analysis of target applications and Services that are envisioned to be hosted on Azure Stack; and • Attend the technical workshops.
Application or Workload Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for the subject area; • Share the application requirements and define the application infrastructure; • Perform the installation and configuration of subject area components; • Attend the technical workshops.
Network Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for the subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the technical workshops.
Storage Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for the subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the technical workshops.
Security Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for the subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the technical workshops.
Active Directory Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the technical workshops.
Operations lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the operations workshops.

Microsoft

Role	Responsibilities
Account Delivery Executive	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; • Manages and coordinates the overall Microsoft project; • Drives delivery governance and operational excellence; and • Serves as a single point of contact for escalations, billing issues, personnel matters, and contract extensions.

Role	Responsibilities
Project Manager	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; • Manages and coordinates Microsoft project delivery; • Is responsible for issue and risk management, change management, project priorities, status communications, and status meetings; • Collaborates with the Domain Solution Architect(s) to manage scope and customer expectations; • Coordinates Microsoft and Microsoft subcontractor resources but not customer resources; and • Optionally delivers Project Management remotely.
Microsoft Azure Architect	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; • Lead the Solution Alignment Workshops (SAW) and select SAW modules. • Assist with Azure configuration and other Solution build activities; • Assist with Solution testing; and • Support the Solution walk-through.
Microsoft Azure Consultant	<ul style="list-style-type: none"> • Provide the estimated project commitment full-time; • Lead select SAW modules; • Lead Azure configuration and other Solution build activities; • Lead Solution development activities; and • Lead Solution testing and walk-through.

4. Customer Responsibilities and Project Assumptions

4.1. Customer Responsibilities

In addition to Customer activities defined herein, the Customer will also be required to:

- Provide information:
 - This includes accurate, timely (within three (3) business days or as mutually agreed-upon), and complete information required for the engagement.
- Provide access to people and resources:
 - This includes access to knowledgeable customer personnel, including business user representatives, and access to funding if additional budget is needed to deliver project scope.
 - Identify key personnel (stakeholders, decision makers, architects, and subject matter specialists) who can participate in the workshops, design sessions, and testing activities described in the **Error! Reference source not found.** section:
 - Confirm key personnel availability and coordinate their participation.
 - Key personnel will attend workshops and design sessions, will provide requirements, and participate in the discussions and decision making:
 - Key personnel identified to participate must be empowered to make decisions on behalf of the organization, and to engage with and coordinate with other teams.
- Provide access to systems:
 - This includes access to all necessary customer work locations, networks, systems, and applications (remote and onsite).

- Provide a work environment:
 - This consists of suitable workspaces, including desks, chairs, and Internet access.
- Manage non-Microsoft resources:
 - The Customer will assume responsibility for the management of all customer personnel and vendors who are not managed by Microsoft.
- Manage external dependencies:
 - The Customer will facilitate any interactions with related projects or programs to manage external project dependencies.

4.2. Operational Standards

The project scope, services, labor, timeline, and our detailed solution are based on the information provided by the Customer to date. During the project, the information and dependencies in this document will be validated, and if a material difference is present, this could result in Microsoft initiating a Change Request to cover additional work or extend the project duration. In addition, the following operational standards have been made:

- Customer resource availability and dispatch may affect timelines.
- Microsoft resources will be mobilized up to four weeks from the date of the Task Order signature.
- If work is interrupted, the activities may be resumed once requested and agreed to by Microsoft. In this case Microsoft may require up to six weeks to mobilize the resources and have the complete project team in place. In this situation Microsoft cannot guarantee that the team members will be the same team members who worked previously in the project.
- Microsoft will engage specific resources as deemed necessary by Microsoft to support a specific technical area. This could require multiple individuals engaged to support the engagement, based on technical specialty.
- Any Customer-caused delay in providing required information, supporting artifacts, or conducting requisite activities could result in schedule impacts that would require modification of the existing Task Order and subject the Customer to increased costs for delivery.
- Customer Lab and / or development facility is available as required.
- Customer agrees that Microsoft may associate Customer's Online Services with Professional Services accounts through configuration of the Customer's subscriptions or Azure resources.
- Customer is ultimately responsible for the Assessment and Authorization (A&A) process or any documentation that is required to support an Authority to Operate (ATO) package.

Requirements Document

ESI

Azure Stack Foundation – Variant II (MEDIUM)

Four Workstreams

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Introduction

Microsoft Azure Stack Hub, herein referred to as Azure Stack, is an extension of the Azure hyperscale cloud that brings compute power closer to the data either on-premises or in a tactical environment. Azure Stack enables organizations to leverage a hybrid, cloud computing architecture even when extending services to disconnected, intermittent connection, or limited bandwidth environments—a common scenario within the Department of Defense (DoD).

The ESI Azure Stack Foundation (ASF) - The Medium Offering features service modules that can be adapted to an organization's operational requirements. It includes core deliveries that support post-deployment integration planning and operations, but it also includes advanced scenarios for hybrid workload deployment patterns.

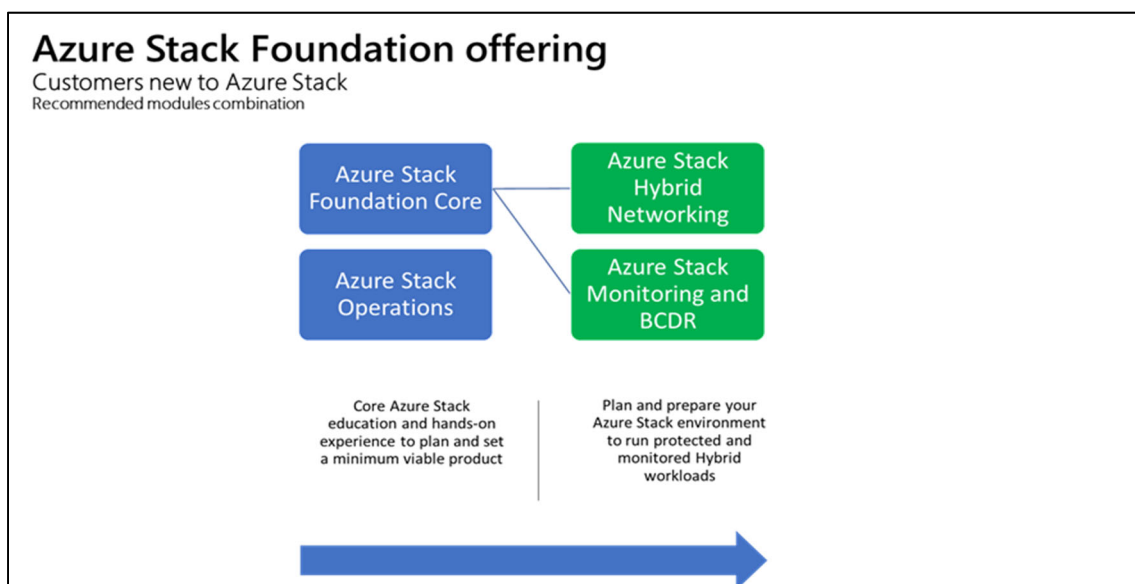
The goals for the Azure Stack Foundation Offering are to:

- Provide hands-on education to help organizations operate and deploy workloads on Azure Stack;
- Prepare organizations to capitalize on hybrid cloud opportunities with Azure and Azure Stack;
- Verify that an organization's design decisions are consistent with Microsoft standards for deploying and configuring Azure Stack;
- Configure Azure Stack to the point of minimum viable operations, so that an organization has no barriers to deploying workloads;
- Document design decisions made for Azure Stack;
- Provide an executive summary presentation that describes what was planned and has been accomplished using Azure Stack.

1. Project Objectives and Scope

1.1. Objectives

The objectives of this project are listed for each workstream in the following graphic and table.



Workstream	Objectives
Azure Stack Foundation Core	Assist an organization in understanding Azure Stack capabilities, including the technical and business considerations required to integrate the Solution into your datacenter.
Azure Stack Operations	This workstream is focused on establishing an operations model for Azure Stack.
Azure Stack Hybrid Networking	Assist an organization in building a hybrid networking pattern (based on a site-to-site VPN) to Azure from Azure Stack.
Azure Stack Monitoring and BCDR	Assist an organization in implementing fabric and tenant monitoring and Business Continuity and Disaster Recovery (BCDR) to use Azure Monitor, System Center Operations Manager (SCOM) Management Pack, Log Analytics, or Azure Site Recovery to implement fabric and tenant monitoring and backup and recovery to support business continuity in the event of a disaster.

1.2. Areas in Scope

This section outlines the work and activities required to accomplish the objectives set forth in this Requirements Document.

1.2.1. General Project Scope

Microsoft will provide Services in support of the following scope:

Area	Description	Assumptions
Azure Stack Foundation Core	Two weeks-long workstream with education and "hands-on" sessions to help an organization understand the breadth of Azure Stack and support them to configure a minimum viable product.	The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope. An Azure Stack Development Kit instance has already been deployed by the organization.
Azure Stack Operations	A week-long workstream, during which Microsoft will support the organization as it builds its Azure Stack service map and a responsible, accountable, consulting, informed (RACI) model that defines its tenant management, monitoring, BCDR, and patch management operations.	The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope.
Azure Stack Hybrid Networking with Azure	A week-long workstream, during which Microsoft will assist the organization with the planning and building of a hybrid networking pattern based on a site-to-site VPN between Azure and Azure Stack.	The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope. This workstream scope does not include the use of a non-Microsoft

Area	Description	Assumptions
	<p>This module is required to deliver any of the Deployment Patterns Proof of Concepts.</p>	<p>VPN gateway, such as third-party network virtual appliances. Should the organization prefer to use a third-party network virtual appliance to establish VPN connectivity, the organization will be responsible for its configuration; however, the Microsoft Consultant can update the Azure Resource Manager templates to include the network virtual appliance.</p> <p>To support Azure VPN, a public IP address must be available for the VPN endpoint.</p>
<p>Azure Stack Monitoring and BCDR</p>	<p>Two weeks-long workstream where Microsoft will help to implement a Hybrid approach to monitoring, backup, and disaster recovery for the Azure Stack.</p> <p>The following scenarios are covered in the monitoring and BCDR pattern:</p> <ul style="list-style-type: none"> • Working with the organization to envision the backup and monitoring requirements; • Assisting the organization in establishing a monitoring capability for its tenant workloads and servers; • Assisting the Customer with the education and configuration of Azure Monitor in Azure Stack for tenant workloads; • Assisting with the deployment and integration of Azure Monitor and Systems Center Operations Manager for tenant workloads; • Managing and monitoring of the Azure Stack fabric using the SCOM management pack; • Planning for the backup of tenant workloads using Azure Backup or Azure Site Recovery for disaster recovery; and • Planning and configuring the Azure Stack fabric backup. 	<p>The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope.</p> <p>An Azure Stack Development Kit instance that tests Azure Stack fabric restore procedures has already been deployed by the organization.</p>

1.2.2. Software Products and Technologies

The products and technology listed in the following table are required for project execution. The party responsible for obtaining the items is indicated.

Product and Technology Item	Version	Responsibility	Ready by
Azure Subscription	Not applicable	Customer	Start of Plan phase
Azure Stack and Original Equipment Manufacturer (OEM) Build	Latest build	Customer	Start of Plan phase
SCOM (required for BCDR pattern)	2016 and later	Customer	Start of Plan phase

1.2.3. Environments

The following environments will be required to deliver the project:

Environment	Location	Responsibility (Setup)	Ready by
Azure	Customer-selected Azure region	Customer	Start of Plan phase
A Deployed and Certified OEM Azure Stack SKU	Customer's on-premises datacenter	Customer	Start of Plan phase
Azure Stack Development Kit–Supported Hardware	Customer's on-premises datacenter	Customer	Start of Plan phase
Production	Azure/on-premises	Customer	2 weeks prior to go-live

1.2.4. Testing and Defect Remediation

Testing

The following testing is included in the scope of the project:

Test Type (Environment)	Description	Responsibility for Providing:			
		Test Execution	Data	Test Cases	Guidance / Support
Unit Testing (Azure Stack)	Automated unit testing for each build, focusing on determining if a unit of code functions as intended.	Microsoft	Microsoft	Microsoft	Customer
Hybrid Pattern Testing	Scenario testing for the selected hybrid pattern.	Microsoft	Microsoft	Microsoft	Customer

Defect Remediation

The following priorities are defined for defect remediation:

Priority	Description	Remediation in Scope?
P1	Blocking Defect Development, testing, or production launch cannot proceed until this type of defect is corrected. A defect of this type blocks further progress in this area. The solution cannot ship, and the project team cannot achieve the next milestone until such a defect is corrected.	Yes
P2	Significant Defect The Defect must be fixed prior to moving to production. Such a defect, however, will not affect test plan implementation.	Yes
P3	Important Defect The Defect is important to correct, however, it is possible to move forward into production using a workaround. <i>*Note: The defect will be logged. Remediation will be performed through an agreed-upon change request only.</i>	No*
P4	Enhancements and Cosmetic Defects Feature enhancement and cosmetic defects, which include design requests that vary from original concepts. <i>*Note: The defect will be logged. Remediation will be performed through an agreed-upon change request only.</i>	No*

1.3. Areas Out of Scope

Any area not explicitly included in the Areas in Scope section is out of scope for Microsoft during this project. Areas out of scope for this project include the following.

Area	Description
Product Licenses and Subscriptions	Product licenses (Microsoft or non-Microsoft) and cloud service subscriptions are not included, unless otherwise noted in section "Software Products and Technologies."
Hardware	Microsoft will not provide hardware for this project.
Implementation of the Azure Stack Development Kit for Production Workloads	Implementation of the Azure Stack Development Kit, which is a nonproduction, single-node instance of Azure Stack that supports development and test activities for application developers and enterprise administrators, is out of scope. While Solutions and integration can be modeled, designed, and developed using this platform, Microsoft does not support running production workloads on Azure Stack Development Kit installations.

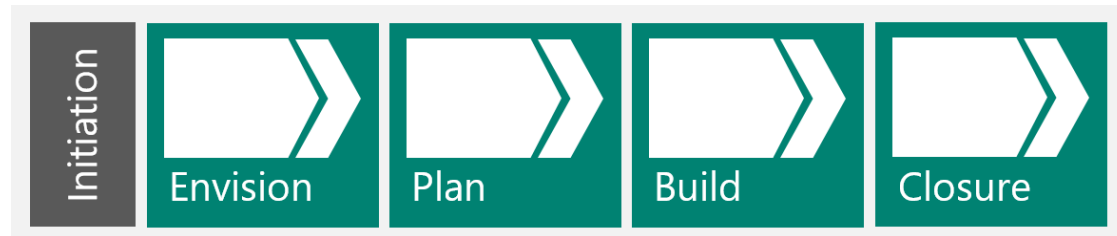
Area	Description
Third-Party Hybrid Connectivity Network Virtual Appliances	There are third-party solutions available to establish hybrid connectivity between the Azure Stack stamp and remote locations. These network virtual appliances are not supported by Microsoft and the deployment and configuration of these solutions must be done by the Customer.
Active Directory Configuration	Configuration of Active Directory Domain Services (AD DS) and Azure Active Directory, beyond that which is explicitly required to support Azure integration, is out of scope.
Custom Automation Development	Creation of automation or scripts for deployment, management, or other purposes is out of scope. Microsoft might share sample automation or scripts to use as a reference. Any extension or customization of this code, however, is out of scope.
Integration with Third-Party Software	Microsoft will not be responsible for integration with third-party software.
Data Migration	Data migration activities are not in scope for this project.
System Integration	System integration and interfaces are not in scope for this project.
Product Bugs and Upgrades	Product upgrades, bugs, and design change requests for Microsoft products are not in scope for this project.
Source Code Review	The Customer will not provide Microsoft with access to non-Microsoft source code or source code information. For any non-Microsoft code, Microsoft Services will be limited to the analysis of binary data, such as a process dump or network monitor trace.
Process Reengineering	Designing functional business components of the solution is not included.
Organizational Change Management	Designing—or redesigning—the Customer’s functional organization is not included.
Certification and Accreditation	Customer regulatory compliance certification and accreditation activities outside of general support for existing Customer processes is out of scope.

2. Project Approach, Timeline, and Deliverable Acceptance

2.1. Approach

The project will be structured following the Microsoft solution delivery methodology across three distinct phases: Envision, Plan/Build, and Closure. Each phase has distinct activities and deliverables that are described in the following sections. When activities and deliverables are complete, the phase is considered complete.

All deliverables are accepted “upon delivery” and do not require formal acceptance.



2.1.1. Engagement Initiation

Before beginning the project and dispatching resources, the following prerequisites must be completed, remotely where applicable.


Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<ul style="list-style-type: none"> Conduct an initiation call to commence team formation and communicate expectations; Document the project launch prerequisites using input from these Requirements Document; Track the status of prerequisites and adjust the workstream initiation phase start date accordingly; and Conduct a detailed walk-through of the Requirements Document with the Customer in order to agree on an initial project schedule and approach.
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> Attend and participate in the initiation call; Assign responsibilities for project initiation and launch prerequisites to accountable customer resources and establish target completion dates; Complete the project initiation and launch prerequisites; Staff the project with the required Customer resources in the time frames that were agreed upon in the initiation call; and Customer networking staff will be responsible for external networking configuration.

2.1.2. Envision Phase

During the Envision phase, the teams (Microsoft and the Customer) will reach agreement on a shared vision for the project, including verification of the identified scope, activities and assumptions required to realize the vision.

Module 1: Azure Stack Foundation Core


Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<ul style="list-style-type: none"> Lead a formal project kickoff meeting to begin onsite activities; and Create a mutually agreed-upon vision and scope.

	
Category	Description
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> • Verify that prerequisites that connect the Customer datacenter to Azure have been met; • Procure a non-trial Azure subscription or verify that an Azure enrollment is in place; • Determine and coordinate key personnel availability; and • Participate in the service kickoff meeting.
Key Assumptions	N/A

Deliverables

Name	Description	Acceptance Required?	Responsibility
Vision and Scope Document	The vision and scope document for the Azure Stack Foundation Core module consists of: <ul style="list-style-type: none"> • The agreement between the team and customer reached the desired solution; and • The overall project direction. 	No	Microsoft
Azure Stack Foundation Kickoff Presentation	A presentation that summarizes the overall workstream activities,	No	Microsoft


Module 2: Azure Stack Operations

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<ul style="list-style-type: none"> • Kick off the Azure Stack Operations engagement; • Share the Modern Service Management Visions and what is in store for Azure Stack Operations; • Validate the schedule for the rest of the delivery; and • Set Customer expectations.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> • Determine and coordinate key personnel availability; and • Participate in the service kickoff meeting.
Key Assumptions	N/A

Deliverables

Name	Description	Acceptance Required?	Responsibility
None	N/A	N/A	N/A


Module 3: Azure Stack Hybrid Connectivity


	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	The Envision phase includes an envisioning exercise in which the consultant will work with the Customer to identify and verify the use case and objectives.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> • Determine and coordinate key personnel availability; • Participate in the service kickoff meeting; and • Participate in the use case and objectives discussions.
Key Assumptions	N/A

Deliverables

Name	Description	Acceptance Required?	Responsibility
There are no specific deliverables for this phase; however, the following areas should be discussed and documented:	<ul style="list-style-type: none"> • Security requirements for the hybrid networking pattern; • Scale requirements for the hybrid networking pattern; • Operational requirements for the hybrid networking pattern; and • Disaster recovery options for the hybrid networking pattern. 	No	Microsoft and Customer

Module 4: Azure Stack Monitoring and BCDR

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	Lead a formal project kickoff meeting in order to begin onsite activities.

	
Category	Description
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> • Verify that prerequisites that connect the Customer datacenter to Azure have been met; • Procure a non-trial Azure subscription or verify that an Azure enrollment is in place; and • Determine and coordinate key personnel availability.
Key Assumptions	N/A

Deliverables


Name	Description	Acceptance Required?	Responsibility
None	N/A	N/A	N/A


2.1.3. Plan and Build

During the Plan phase, the team will develop a detailed plan for the project that includes a list of activities that are to be completed, and the project schedule. In the Build phase, the team will assist the Customer with hands-on training and in-scope modules.

Module 1: Azure Stack Foundation Core

The Plan and Build phases are focused on educating the Customer on infrastructure aspects of Azure Stack and working with the Customer to either build the expected configuration of its multimodal Azure Stack system (or systems) or by modeling the expected configuration using an Azure Stack Development Kit instance.


	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	The following topics will be covered by the consultant during the Plan and Build phases: <ul style="list-style-type: none"> • Azure Stack governance; • Azure Stack billing; • Azure Stack Infrastructure as a Service (IaaS); • Azure Stack Platform as a Service (PaaS); • Azure Stack DevOps introduction; • Azure Stack support; and • Azure Stack deployment patterns.


	
Category	Description
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> Participate in the educational sessions; Make or confirm design decisions about the configuration of the production Azure Stack; and Participate in the implementation of the Azure Stack configuration that is based on accepted design decisions. The configuration will either be implemented in the deployed Azure Stack multimodal scale units or into a development or test environment through the use of an Azure Stack Development Kit server (this server would be provided by the Customer).
Key Assumptions	<ul style="list-style-type: none"> The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope. An Azure Stack Development Kit instance has already been deployed by the Customer.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Design Decision Spreadsheet	A Microsoft Excel spreadsheet that describes the Azure Stack–related design and configuration decisions made during this phase of the engagement.	No	Microsoft

Module 2: Azure Stack Operations

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>Microsoft will also conduct a set of interactive educational sessions, focused on Azure Stack Operations, including:</p> <ul style="list-style-type: none"> The Azure Stack service map; The Azure Stack service description; The Azure Stack RACI model; The Azure Stack monitoring; The Azure Stack tenant management; The Azure Stack backup and restore; The Azure Stack patch and update; The Azure Stack capacity management; and The Azure Stack operational tasks.


	
Category	Description
Customer Activities (The activities to be performed by the Customer.)	The Customer will participate in the workshops to refine the operational practices related to Azure Stack.
Key Assumptions	Azure Stack operational teams will be able to participate in the workshops and make decisions about how to operate Azure Stack.


Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Stack Service Map	A Microsoft Visio diagram that depicts the Azure Stack environment and its corresponding dependencies.	No	Microsoft
Azure Stack Service Description	A Word Document with a service description of Azure Stack and a definition of the Customer requirements of the service.	No	Microsoft
Azure Stack RACI Model	An Excel spreadsheet that provides an overview of the roles and responsibilities needed to manage and support Azure.	No	Microsoft
Azure Stack Operational Tasks	An Excel spreadsheet that outlines the daily, weekly, monthly, and specific tasks needed to manage Azure Stack.	No	Microsoft

Module 3: Azure Stack Hybrid Networking

The Plan and Build phases are focused on the creation of Azure Resource Manager templates and the building of the Solution in the Customer's environment

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The following activities will be conducted during the Plan and Build phases by the consultant.</p> <p>Create an Azure Resource Manager template example that:</p> <ul style="list-style-type: none"> • Creates virtual networking components in Azure and Azure Stack; • Creates local network gateways in Azure and Azure Stack; • Configures virtual networking connections in Azure and Azure Stack; • Verifies routing and connectivity; and • Deploys Azure Resource Manager template to Customer's environment.


	
Category	Description
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> • Provide the access to Azure and Azure Stack that consultants need to configure and deploy Azure networking components; • The Customer will provide subject matter experts from its networking and firewall and security teams; and • Public IP addresses must be provided to support the hybrid Networking pattern.
Key Assumptions	<ul style="list-style-type: none"> • An Azure Stack original equipment manufacturer certified multi-node deployment is required to implement this pattern; • This service scope does not include the use of non-Microsoft VPN gateway such as third-party network virtual appliances; and • The Customer should be responsible for the configuration of the network virtual appliance; however, the consultant can update the Azure Resource Manager templates to include the network virtual appliance.


Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Resource Manager Template	An Azure Resource Manager template that can be used for the deployment of the Azure and Azure Stack hybrid networking component.	No	Microsoft

Module 4: Azure Stack Monitoring and BCDR

The Plan and Build phases are focused on the creation of the Azure Resource Manager Templates and building the Solution in the Customer's environment.

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The Microsoft Consultant will conduct the following activities during the Plan and Build phase:</p> <p>Work with the Customer to identify the monitoring and BCDR requirements of the Azure Stack tenants and fabric and show the Customer the following capabilities:</p> <p>Tenant Space Monitoring:</p> <ul style="list-style-type: none"> • Help the Customer install an Azure Stack monitor PoC on up to 5 virtual machines; • Assist the Customer with the deployment of an agent for either SCOM or Azure Monitor (Microsoft Monitoring Agent) on up to 5 virtual machines;

	
Category	Description
	<ul style="list-style-type: none"> • Verify reporting into Azure Monitor and/or SCOM dashboard; and • Review the Azure Monitor and SCOM Alerts and Notifications with the Customer <p>Fabric Monitoring:</p> <ul style="list-style-type: none"> • Deploy the SCOM Azure Stack management pack; • Configure the SCOM Azure Stack management pack; and • Review the Azure Monitor and SCOM Alerts and Notifications with the Customer. <p>Azure Stack Tenant BCDR:</p> <ul style="list-style-type: none"> • Conduct backup and high availability planning for tenant workloads (tenant backup and Azure Site Recovery). <p>Azure Stack Fabric BCDR:</p> <ul style="list-style-type: none"> • Conduct Azure Stack backup requirement planning; and • Configure the Azure Stack backup process.
Customer Activities (The activities to be performed by the Customer.)	<p>Customer will:</p> <ul style="list-style-type: none"> • Participate in all workshops as required; • Provide required access to the monitoring and backup infrastructure as required to complete the scope of work; and • Provide required access to Azure and Azure Stack subscriptions.
Key Assumptions	<ul style="list-style-type: none"> • The Customer has an operational Azure Subscription. • The Customer has an operational SCOM deployment.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Backup Configuration Documentation	Testing and documenting procedures for the backup and high availability of tenant workloads.	No	Microsoft

2.1.4. Closure

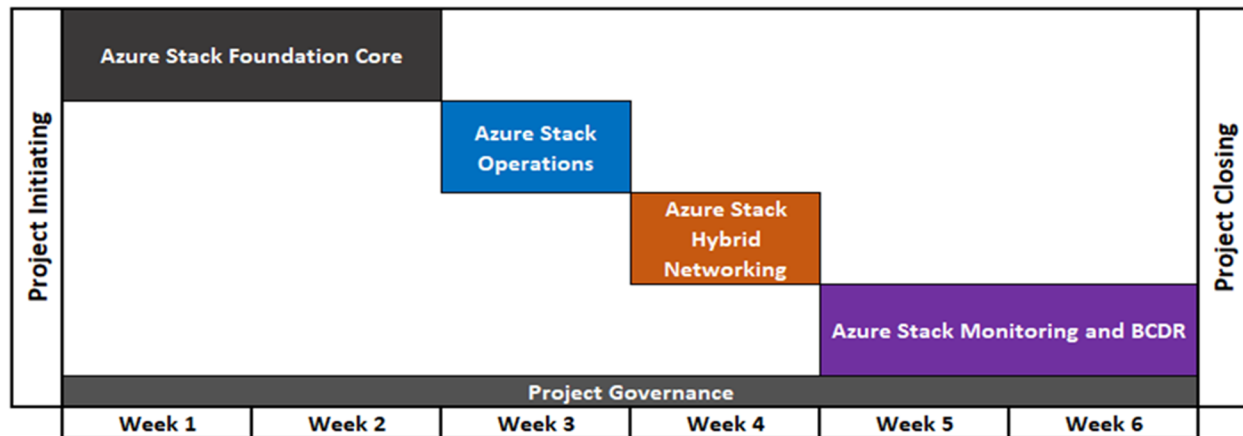
During the Closure phase, the team will close the project and will discuss possible next steps, based on the lessons learned during the Plan and **Error! Reference source not found.** phases. The closeout meeting will be completed after all modules in the Plan and Build phases have been completed.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Stack Foundation Core Executive Summary	PowerPoint presentation with the Azure Stack Foundation Core module executive summary.	No	Microsoft
Azure Stack Hybrid Networking Summary Presentation	A PowerPoint presentation contains the Azure Stack Hybrid Networking module executive summary.	No	Microsoft
Azure Stack Monitoring and BCDR Summary Presentation	A PowerPoint presentation that contains the Azure Stack monitoring and BCDR module executive summary.	No	Microsoft

2.2. Timeline

During project planning, a detailed timeline will be developed. The timeline below is a high-level representation, all dates, and durations are relative to the project start date and are estimates only. If the project timeline changes significantly, a Change Request may be issued following the Change Management Process. The total duration of ESI Azure Stack Foundation (ASF) – Medium Offering is 6 weeks.



2.3. Deliverable Acceptance Process

Microsoft has no specific service deliverables requiring formal acceptance.

2.4. Project Governance

The governance structure and processes the team will adhere to for the project are described in the following sections:

2.4.1. Project Communications

The following will be used to communicate during the project:

- **Communications Plan:** This document will describe the frequency, audience, and content of communication with the team and stakeholders. It will be developed by Microsoft and the Customer as part of project planning.
- **Status Reports:** The Microsoft team will prepare and issue regular status reports to project stakeholders per the frequency defined in the communication plan.
- **Status Meetings:** The Microsoft team will schedule regular status meetings, per the frequency defined in the communication plan, to review the overall project status, the acceptance of deliverables, and review open issues and risks.

2.4.2. Risk and Issue Management

The following general procedure will be used to manage active project issues and risks during the project:

- **Identify:** Identify and document project issues and risks (potential issues that could affect the project);
- **Analyze and Prioritize:** Assess the potential impact and determine the highest priority risks and issues that will be actively managed;
- **Plan and Schedule:** Determine the strategy for managing priority risks and issues and identify a resource who can take responsibility for mitigation and remediation;
- **Track and Report:** Monitor and report the status of risks and issues;
- **Escalate:** Escalate to project sponsors the high impact issues and risks that the team is unable to resolve; and
- **Control:** Review the effectiveness of risk and issue management actions.

Active issues and risks will be regularly monitored during the project.

2.4.3. Change Management Process (Contract Modification)

During the project, either party may request in writing, modifications to the scope of services described with in this requirement document. Approved modifications will be managed through the contracting office and could lead to additional costs and schedule impacts. These modifications only take effect when the proposed modification is agreed upon by all parties via a Contracting Officer approved task order modification. The modification management process steps are:

All modification requests will be documented in a mutually agreeable format (modification request form). Microsoft or Customer identified modifications will be submitted to the Contracting Officer. All modification requests must include:

- A description of the modification; and
- The estimated effect of implementing the modification including impact on the project scope, schedule, and labor.

The Contracting Officer will then work with the customer and Microsoft to determine if the modification is within scope of the task order as well as ESI and, if applicable, execute a task order modification.

Any delays due to Customer dependencies or deliverables which may impact project schedule, effort, and cost will be managed by the process outlined in this section.

Microsoft shall have no obligation to commence work in connection with any modification until the details of the modification are approved by the Contracting Officer in a task order modification.

2.4.4. Escalation Path

The Microsoft project manager will work closely with the Customer project manager, sponsor, and other designees to manage project issues, risks, and change requests as described previously. The Customer will provide reasonable access to the sponsor or sponsors to expedite resolution. The standard escalation path for review, approval, or dispute resolution is as follows:

- Project team member (Microsoft or the Customer)
- Project manager (Microsoft and the Customer)
- Microsoft delivery manager
- Microsoft and the Customer project sponsor

2.5. Project Completion

Microsoft will provide services defined in this Requirements Document. If additional services are required, the Change Management Process will be followed, and the contract modified. The project will be considered complete when at least one of the following conditions has been met:

- All Microsoft in-scope tasks have been completed.
- The period of performance (Term) of the project has expired.
- The task order for the project is terminated pursuant to the provisions of the base contract.

3. Project Organization

3.1. Project Roles and Responsibilities

The key project and leadership roles and the responsibilities are as follows.

Customer

Role	Responsibilities
Project Sponsor	<ul style="list-style-type: none"> • Is available full time, 30-40 hours a week, at project start and end; • Services part time throughout; • Make key project decisions as needed; and • Serves as a point of escalation to support clearing project roadblocks.
Project Manager	<ul style="list-style-type: none"> • Is available full time, 30-40 hours a week, throughout project; • Serves as the primary point of contact for the Microsoft team; • Manages the overall project; • Delivers the project on schedule; • Take responsibility for Customer resource allocation, risk management, and project priorities; and • Communicate with executive stakeholders.

Role	Responsibilities
Technical Team Lead	<ul style="list-style-type: none"> • Is available full time, 40 hours a week, throughout project; • Serves as the primary technical point of contact; • Coordinate efforts with the other technical leads; and • Coordinate the implementation activities across all workstreams.
Lead Business Analyst	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; 10- 20 hours a week • Serve as primary functional point of contact for the team that is responsible for functional business analysis of target applications and Services that are envisioned to be hosted on Azure Stack; and • Attend the technical workshops.
Application or Workload Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for the subject area; • Share the application requirements and define the application infrastructure; • Manage and perform the installation and configuration of subject area components; • Attend the technical workshops.
Network Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for the subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the technical workshops.
Storage Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for the subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the technical workshops.
Security Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for the subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the technical workshops.
Active Directory Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the technical workshops.
Operations lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the operations workshops.

Microsoft

Role	Responsibilities
Account Delivery Executive	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; • Manages and coordinates the overall Microsoft project; • Drives delivery governance and operational excellence; and • Serves as a single point of contact for escalations, billing issues, personnel matters, and contract extensions.
Project Manager	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; • Manages and coordinates Microsoft project delivery; • Is responsible for issue and risk management, change management, project priorities, status communications, and status meetings; • Collaborates with the Domain Solution Architect(s) to manage scope and customer expectations; • Coordinates Microsoft and Microsoft subcontractor resources but not customer resources; and • Optionally delivers Project Management remotely.
Microsoft Azure Architect	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; • Lead the Solution Alignment Workshops (SAW) and select SAW modules. • Assist with Azure configuration and other Solution build activities; • Assist with Solution testing; and • Support the Solution walk-through.
Microsoft Azure Consultant	<ul style="list-style-type: none"> • Provide the estimated project commitment full-time; • Lead selects SAW modules; • Lead Azure configuration and other Solution build activities; • Lead Solution development activities; and • Lead Solution testing and walk-through.

4. Customer Responsibilities and Project Assumptions

4.1. Customer Responsibilities

In addition to Customer activities defined herein, the Customer will also be required to:

- Provide information:
 - This includes accurate, timely (within three (3) business days or as mutually agreed-upon), and complete information required for the engagement.
- Provide access to people and resources:
 - This includes access to knowledgeable customer personnel, including business user representatives, and access to funding if additional budget is needed to deliver project scope.
 - Identify key personnel (stakeholders, decision makers, architects, and subject matter specialists) who can participate in the workshops, design sessions, and testing activities described in the **Error! Reference source not found.** section:
 - Confirm key personnel availability and coordinate their participation.

- Key personnel will attend workshops and design sessions, will provide requirements, and participate in the discussions and decision making:
 - Key personnel identified to participate must be empowered to make decisions on behalf of the organization, and to engage with and coordinate with other teams.
- Provide access to systems:
 - This includes access to all necessary customer work locations, networks, systems, and applications (remote and onsite).
- Provide a work environment:
 - This consists of suitable workspaces, including desks, chairs, and Internet access.
- Manage non-Microsoft resources:
 - The Customer will assume responsibility for the management of all customer personnel and vendors who are not managed by Microsoft.
- Manage external dependencies:
 - The Customer will facilitate any interactions with related projects or programs to manage external project dependencies.

4.2. Operational Standards

The project scope, services, labor, timeline, and our detailed solution are based on the information provided by the Customer to date. During the project, the information and dependencies in this document will be validated, and if a material difference is present, this could result in Microsoft initiating a Change Request to cover additional work or extend the project duration. In addition, the following operational standards have been made:

- Customer resource availability and dispatch may affect timelines.
- Microsoft resources will be mobilized up to four weeks from the date of the Task Order signature.
- If work is interrupted, the activities may be resumed once requested and agreed to by Microsoft. In this case Microsoft may require up to six weeks to mobilize the resources and have the complete project team in place. In this situation Microsoft cannot guarantee that the team members will be the same team members who worked previously in the project.
- Microsoft will engage specific resources as deemed necessary by Microsoft to support a specific technical area. This could require multiple individuals engaged to support the engagement, based on technical specialty.
- Any Customer-caused delay in providing required information, supporting artifacts, or conducting requisite activities could result in schedule impacts that would require modification of the existing Task Order and subject the Customer to increased costs for delivery.
- Customer Lab and/or development facilities are available as required.
- Customer agrees that Microsoft may associate Customer's Online Services with Professional Services accounts through configuration of the Customer's subscriptions or Azure resources.
- Customer is ultimately responsible for the Assessment and Authorization (A&A) process or any documentation that is required to support an Authority to Operate (ATO) package.

Requirements Document

ESI

Azure Stack Foundation – Variant III (LARGE)

Four Workstreams and a Two-week Proof of Concept of Choice

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Introduction

Microsoft Azure Stack Hub, herein referred to as Azure Stack, is an extension of the Azure hyperscale cloud that brings compute power closer to the data either on-premises or in a tactical environment. Azure Stack enables organizations to leverage a hybrid, cloud computing architecture even when extending services to disconnected, intermittent connection, or limited bandwidth environments—a common scenario within the Department of Defense (DoD).

The ESI Azure Stack Foundation (ASF) - Large offering features service modules that can be adapted to an organization's operational requirements. It includes core deliveries that support post-deployment integration planning and operations, but it also includes advanced scenarios for hybrid workload deployment patterns.

The goals for the Azure Stack Foundation Offering are to:

- Provide hands-on education to help organizations operate and deploy workloads on Azure Stack;
- Prepare organizations to capitalize on hybrid cloud opportunities with Azure and Azure Stack;
- Verify that an organization's design decisions are consistent with Microsoft standards for deploying and configuring Azure Stack;
- Configure Azure Stack to the point of minimum viable operations, so that an organization has no barriers to deploying workloads;
- Document design decisions made for Azure Stack;
- Help an organization understand how to design and deploy different workload patterns by selecting one of the following 2-week proof of concepts (PoCs):
 - Geo-distributed applications
 - Cross-cloud scaling,
 - Staged data analytics
 - Data Sovereignty
 - Continuous Integration/Continuous Deployment (CICD)/DevOps hybrid pattern
- Provide an executive summary presentation that describes what was planned and has been accomplished using Azure Stack.

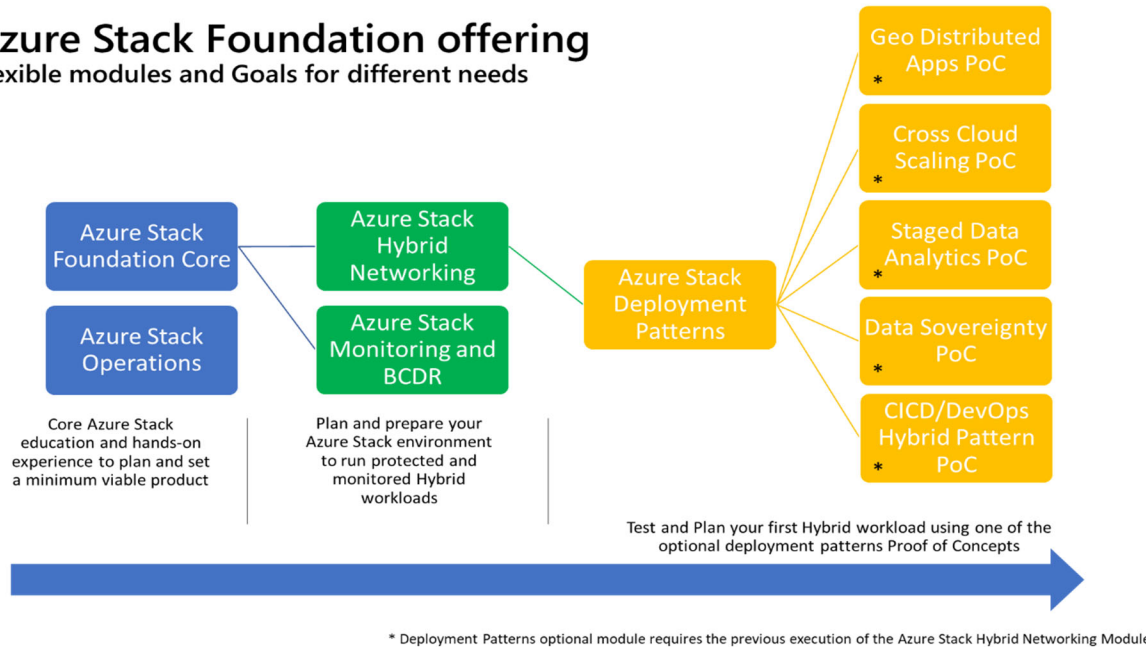
1. Project Objectives and Scope

1.1. Objectives

The objectives of this project are listed for each workstream in the following graphic and table. Customer may only select one of the PoCs listed in the yellow boxes.

Azure Stack Foundation offering

Flexible modules and Goals for different needs



Workstream	Objectives
Azure Stack Foundation Core	Assist an organization in understanding Azure Stack capabilities, including the technical and business considerations required to integrate the Solution into your datacenter.
Azure Stack Operations	Workstream focused on establishing an operations model for Azure Stack.
Azure Stack Hybrid Networking	Assist an organization in building a hybrid networking pattern (based on a site-to-site VPN) to Azure from Azure Stack.
Azure Stack Monitoring and BCDR	Assist an organization in implementing fabric and tenant monitoring and Business Continuity and Disaster Recovery (BCDR) that uses Azure Monitor, System Center Operations Manager (SCOM) Management Pack, Log Analytics, or Azure Site Recovery to implement fabric and tenant monitoring and backup and recovery to support business continuity in the event of a disaster.
Select one of the following two-week proof of concepts (PoC): <ul style="list-style-type: none"> Geo-Distributed Applications; Cross-Cloud Scaling; Staged Data Analytics; Data Sovereignty; CICD/DevOps Hybrid Pattern 	Geo-Distributed Applications: <ul style="list-style-type: none"> Assist in designing and deploying geo-distributed application pattern. Cross-Cloud Scaling: <ul style="list-style-type: none"> Assist in designing and deploying a cross-cloud scaling workload pattern. Staged Data Analytics: <ul style="list-style-type: none"> Assist in designing and deploying a staged data analytics workload pattern. Data Sovereignty: <ul style="list-style-type: none"> Assist in designing and deploying a data sovereignty pattern. CICD/DevOps Hybrid Pattern: <ul style="list-style-type: none"> Assist in designing and deploying a CICD or DevOps hybrid pattern.

1.2. Areas in Scope

This section outlines the work and activities required to accomplish the objectives set forth in this Requirements Document.

1.2.1. General Project Scope

Microsoft will provide Services in support of the following scope:

Area	Description	Assumptions
Azure Stack Foundation Core	Two weeks-long workstream with education and “hands-on” sessions to help an organization understand the breadth of Azure Stack and support them to configure a minimum viable product.	<p>The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope.</p> <p>An Azure Stack Development Kit instance has already been deployed by the organization.</p>
Azure Stack Operations	A week-long workstream, during which Microsoft will support the organization as it builds its Azure Stack service map and a responsible, accountable, consulting, informed (RACI) model that defines its tenant management, monitoring, BCDR, and patch management operations.	<p>The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope.</p>
Azure Stack Hybrid Networking with Azure	<p>A week-long workstream, during which Microsoft will assist the organization with the planning and building of a hybrid networking pattern based on a site-to-site VPN between Azure and Azure Stack.</p> <p>This module is required to deliver any of the Deployment Patterns Proof of Concepts.</p>	<p>The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope.</p> <p>This workstream scope does not include the use of a non-Microsoft VPN gateway, such as third-party network virtual appliances. Should the organization prefer to use a third-party network virtual appliance to establish VPN connectivity, the organization will be responsible for its configuration; however, the Microsoft Consultant can update the Azure Resource Manager templates to include the network virtual appliance.</p> <p>To support Azure VPN, a public IP address must be available for the VPN endpoint.</p>

Area	Description	Assumptions
Azure Stack Monitoring and BCDR	<p>Two weeks-long workstream where Microsoft will help to implement a Hybrid approach to monitoring, backup, and disaster recovery for the Azure Stack.</p> <p>The following scenarios are covered in the monitoring and BCDR pattern:</p> <ul style="list-style-type: none"> Working with the organization to envision the backup and monitoring requirements; Assisting the organization in establishing a monitoring capability for its tenant workloads and servers; Assisting the Customer with the education and configuration of Azure Monitor in Azure Stack for tenant workloads; Assisting with the deployment and integration of Azure Monitor and Systems Center Operations Manager for tenant workloads; Managing and monitoring of the Azure Stack fabric using the SCOM management pack; Planning for the backup of tenant workloads using Azure Backup or Azure Site Recovery for disaster recovery; and Planning and configuring the Azure Stack fabric backup. 	<p>The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope.</p> <p>An Azure Stack Development Kit instance that tests Azure Stack fabric restore procedures has already been deployed by the organization.</p>
Includes one of the following two-week proof of concepts: <ul style="list-style-type: none"> Geo-Distributed Applications Cross-Cloud Scaling Staged Data Analytics Data Sovereignty CICD/ DevOps Hybrid Pattern 	<p>Geo-distributed application PoC:</p> <ul style="list-style-type: none"> Two-weeks long workstream to provide guidance on designing and deploying geo-distributed applications by planning and building a PoC. <p>Cross-cloud scaling PoC:</p> <ul style="list-style-type: none"> Two-weeks long workstream to assist with designing and deploying a cross-cloud scaling workload by planning and building a PoC. <p>Staged data analytics:</p>	<p>Azure Stack Hybrid Networking module has been completed before this module starts.</p> <p>Microsoft equates a single day to 8 hours and a single week to 40 hours.</p>

Area	Description	Assumptions
	<ul style="list-style-type: none"> Two-weeks long workstream to assist with designing and deploying a staged data analytics workload by planning and building a PoC. <p>Data sovereignty:</p> <ul style="list-style-type: none"> Two-weeks long workstream to assist with designing and deploying a data sovereignty workload by planning and building a PoC. <p>CICD/DevOps hybrid pattern:</p> <ul style="list-style-type: none"> Two-weeks long workstream to assist with designing and deploying a CICD/DevOps hybrid pattern by planning and building a PoC. 	

1.2.2. Software Products and Technologies

The products and technology listed in the following table are required for project execution. The party responsible for obtaining the items is indicated.

Product and Technology Item	Version	Responsibility	Ready by
Azure Subscription	Not applicable	Customer	Start of Plan phase
Azure Stack and Original Equipment Manufacturer (OEM) Build	Latest build	Customer	Start of Plan phase
SCOM (required for BCDR pattern)	2016 and later	Customer	Start of Plan phase
Microsoft SQL Server (for Hybrid Patterns)	2016 or later	Customer	Start of Plan phase
Visual Studio Community Edition (for CICD patterns)	Latest	Customer	Start of Plan phase
Visual Studio Code (for CICD patterns)	Latest	Customer	Start of Plan phase
Azure DevOps (for CICD Patterns)	Not applicable	Customer	Start of Plan phase

1.2.3. Environments

The following environments will be required to deliver the project:

Environment	Location	Responsibility (Setup)	Ready by
Azure	Customer-selected Azure region	Customer	Start of Plan phase
A Deployed and Certified OEM Azure Stack SKU	Customer's on-premises datacenter	Customer	Start of Plan phase
Azure Stack Development Kit–Supported Hardware	Customer's on-premises datacenter	Customer	Start of Plan phase
Production	Azure/on-premises	Customer	2 weeks prior to go-live

1.2.4. Testing and Defect Remediation

Testing

The following testing is included in the scope of the project:

Test Type (Environment)	Description	Responsibility for Providing:			
		Test Execution	Data	Test Cases	Guidance / Support
Unit Testing (Azure Stack)	Automated unit testing for each build, focusing on determining if a unit of code functions as intended.	Microsoft	Microsoft	Microsoft	Customer
Hybrid Pattern Testing	Scenario testing for the selected hybrid pattern.	Microsoft	Microsoft	Microsoft	Customer

Defect Remediation

The following priorities are defined for defect remediation:

Priority	Description	Remediation in Scope?
P1	Blocking Defect Development, testing, or production launch cannot proceed until this type of defect is corrected. A defect of this type blocks further progress in this area. The solution cannot ship, and the project team cannot achieve the next milestone until such a defect is corrected.	Yes
P2	Significant Defect The Defect must be fixed prior to moving to production. Such a defect, however, will not affect test plan implementation.	Yes

Priority	Description	Remediation in Scope?
P3	Important Defect The Defect is important to correct, however, it is possible to move forward into production using a workaround. <i>*Note: The defect will be logged. Remediation will be performed through an agreed-upon change request only.</i>	No*
P4	Enhancements and Cosmetic Defects Feature enhancement and cosmetic defects, which include design requests that vary from original concepts. <i>*Note: The defect will be logged. Remediation will be performed through an agreed-upon change request only.</i>	No*

1.3. Areas Out of Scope

Any area not explicitly included in the Areas in Scope section is out of scope for Microsoft during this project. Areas out of scope for this project, include the following.

Area	Description
Product Licenses and Subscriptions	Product licenses (Microsoft or non-Microsoft) and cloud service subscriptions are not included, unless otherwise noted in section "Software Products and Technologies."
Hardware	Microsoft will not provide hardware for this project.
Implementation of the Azure Stack Development Kit for Production Workloads	Implementation of the Azure Stack Development Kit, which is a nonproduction, single-node instance of Azure Stack that supports development and test activities for application developers and enterprise administrators, is out of scope. While Solutions and integration can be modeled, designed, and developed using this platform, Microsoft does not support running production workloads on Azure Stack Development Kit installations.
Third-Party Hybrid Connectivity Network Virtual Appliances	There are third-party solutions available to establish hybrid connectivity between the Azure Stack stamp and remote locations. These network virtual appliances are not supported by Microsoft and the deployment and configuration of these solutions must be done by the Customer.
Active Directory Configuration	Configuration of Active Directory Domain Services (AD DS) and Azure Active Directory, beyond that which is explicitly required to support Azure integration, is out of scope.
Custom Automation Development	Creation of automation or scripts for deployment, management, or other purposes is out of scope. Microsoft might share sample automation or scripts to use as a reference. Any extension or customization of this code, however, is out of scope.
Integration with Third-Party Software	Microsoft will not be responsible for integration with third-party software.

Area	Description
Data Migration	Data migration activities are not in scope for this project.
System Integration	System integration and interfaces are not in scope for this project.
Product Bugs and Upgrades	Product upgrades, bugs, and design change requests for Microsoft products are not in scope for this project.
Source Code Review	The Customer will not provide Microsoft with access to non-Microsoft source code or source code information. For any non-Microsoft code, Microsoft Services will be limited to the analysis of binary data, such as a process dump or network monitor trace.
Process Reengineering	Designing functional business components of the solution is not included.
Organizational Change Management	Designing—or redesigning—the Customer’s functional organization is not included.
Certification and Accreditation	Customer regulatory compliance certification and accreditation activities outside of general support for existing Customer processes is out of scope.

2. Project Approach, Timeline, and Deliverable Acceptance

2.1. Approach

The project will be structured following the Microsoft solution delivery methodology across three distinct phases: Envision, Plan/Build, and Closure. Each phase has distinct activities and deliverables that are described in the following sections. When activities and deliverables are complete, the phase is considered complete.

Customer can only execute **one** Proof of Concept (PoC - identified as modules 5 through 9 in the subsequent phases and sections). Each PoC is two weeks in duration. The Customer should pick the PoC that aligns closest with their minimum viable product (MVP) requirements. As an example, for hybrid, code-based infrastructure deployments, the Customer would likely execute Module 9—the CICD/DevOps hybrid pattern. If module 9 is selected, then modules 5, 6, 7, and 8 would be out of scope unless Microsoft was engaged to create a separate, custom package. See Customer Activities for Envision Phase.

If a deliverable requires formal review and acceptance (a process described in the

Deliverable Acceptance Process section), this is indicated in the following sections. Otherwise, the deliverables are accepted “upon delivery” and do not require formal acceptance.



2.1.1. Engagement Initiation


Before beginning the project and dispatching resources, the following prerequisites must be completed, remotely where applicable.

Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<ul style="list-style-type: none"> • Conduct an initiation call to commence team formation and communicate expectations; • Document the project launch prerequisites using input from this Requirements Document; • Track the status of prerequisites and adjust the workstream initiation phase start date accordingly; and • Conduct a detailed walk-through of the Requirements Document with the Customer in order to agree on an initial project schedule and approach.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> • Attend and participate in the initiation call; • Assign responsibilities for project initiation and launch prerequisites to accountable customer resources and establish target completion dates; • Complete the project initiation and launch prerequisites; • Staff the project with the required Customer resources in the time frames that were agreed upon in the initiation call; and • Customer networking staff will be responsible for external networking configuration.

2.1.2. Envision Phase

During the Envision phase, the teams (Microsoft and the Customer) will reach agreement on a shared vision for the project, including verification of the identified scope, activities and assumptions required to realize the vision.


Module 1: Azure Stack Foundation Core

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<ul style="list-style-type: none"> • Lead a formal project kickoff meeting to begin onsite activities; and • Create a mutually agreed-upon vision and scope.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> • Verify that prerequisites that connect the Customer datacenter to Azure have been met; • Procure a non-trial Azure subscription or verify that an Azure enrollment is in place; • Determine and coordinate key personnel availability; and • Participate in the service kickoff meeting. • Select one Proof of Concept that aligns closest with their minimum viable product (MVP) requirements.
Key Assumptions	N/A

Deliverables

Name	Description	Acceptance Required?	Responsibility
Vision and Scope Document	The vision and scope document for the Azure Stack Foundation Core module consists of: <ul style="list-style-type: none"> The agreement between the team and customer reached on the desired solution; and The overall project direction. 	No	Microsoft
Azure Stack Foundation Kickoff Presentation	A presentation that summarizes the overall workstream activities,	No	Microsoft


Module 2: Azure Stack Operations

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<ul style="list-style-type: none"> Kick off the Azure Stack Operations workstream; Share the Modern Service Management Visions and what is in store for Azure Stack Operations; Validate the schedule for the rest of the delivery; and Set Customer expectations.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> Determine and coordinate key personnel availability; and Participate in the service kickoff meeting.
Key Assumptions	N/A

Deliverables

Name	Description	Acceptance Required?	Responsibility
None	N/A	N/A	N/A


Module 3: Azure Stack Hybrid Connectivity

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	The Envision phase includes an envisioning exercise in which the consultant will work with the Customer to identify and verify the use case and objectives.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> • Determine and coordinate key personnel availability; • Participate in the service kickoff meeting; and • Participate in the use case and objectives discussions.
Key Assumptions	N/A

Deliverables

Name	Description	Acceptance Required?	Responsibility
There are no specific deliverables for this phase; however, the following areas should be discussed and documented:	<ul style="list-style-type: none"> • Security requirements for the hybrid networking pattern; • Scale requirements for the hybrid networking pattern; • Operational requirements for the hybrid networking pattern; and • Disaster recovery options for the hybrid networking pattern. 	No	Microsoft and Customer


Module 4: Azure Stack Monitoring and BCDR

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	Lead a formal workstream kickoff meeting in order to begin onsite activities.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> • Verify that prerequisites that connect the Customer datacenter to Azure have been met; • Procure a non-trial Azure subscription or verify that an Azure enrollment is in place; and • Determine and coordinate key personnel availability.
Key Assumptions	N/A

Deliverables

Name	Description	Acceptance Required?	Responsibility
None	N/A	N/A	N/A


Module 5: Geo-Distributed App PoC

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The Envision phase includes an envisioning exercise in which the consultant will work with the Customer to:</p> <ul style="list-style-type: none"> Identify and verify the use case and the objectives of the PoC; and Determine whether there is a need to map a DNS name to the deployed application. If the Customer already owns a domain, determine whether it can be verified and mapped to the web application.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> Determine and coordinate key personnel availability; and Participate in the service kickoff meeting.
Key Assumptions	If this module is selected, then modules 6, 7, 8, and 9 are out of scope.

Deliverables

Name	Description	Acceptance Required?	Responsibility
There are no specific deliverables for this phase; however, the following areas should be discussed and documented:	<ul style="list-style-type: none"> Security requirements for the pattern; Scale requirements for the pattern; Operational requirements for the pattern; and Hybrid application requirements for the Customer, 	No	N/A


Module 6: Cross-Cloud Scaling PoC

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	The Envision phase includes an envisioning exercise in which the consultant will work with the Customer to identify and verify the use case and the objectives of the PoC.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> Determine and coordinate the timing of key personnel availability; and Participate in the service kickoff meeting.
Key Assumptions	If this module is selected, then modules 5, 7, 8, and 9 are out of scope.

Deliverables

Name	Description	Acceptance Required?	Responsibility
There are no specific deliverables for this phase; however, the following areas should be discussed and documented:	<ul style="list-style-type: none"> Security requirements for the pattern; Scale requirements for the pattern; Operational requirements for the pattern; and Hybrid application requirements for the Customer. 	No	N/A


Module 7: Staged Data Analytics PoC

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	The Envision phase includes an envisioning exercise where the consultant will work with the Customer to identify and verify the use case and the objectives of the PoC
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> Verify that prerequisites that connect the Customer datacenter to Azure have been met; Procure a non-trial Azure subscription or verify that an Azure enrollment is in place; and Determine, and coordinate the timing of, key personnel availability.
Key Assumptions	If this module is selected, then modules 5, 6, 8, and 9 are out of scope.

Deliverables

Name	Description	Acceptance Required?	Responsibility
There are no specific deliverables for this phase; however, the following areas should be discussed and documented:	<ul style="list-style-type: none"> Security requirements for the pattern; Scale requirements for the pattern; Operational requirements for the pattern; and Hybrid application requirements for the Customer. 	No	N/A


Module 8: Data Sovereignty PoC

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	The Envision phase includes an envisioning exercise where the Microsoft Consultant will work with the Customer to identify and verify the use case and the objectives of the PoC,
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> Determine and coordinate the timing of key personnel availability; and Participate in the service kickoff meeting.
Key Assumptions	If this module is selected, then modules 5, 6, 7, and 9 are out of scope.

Deliverables

Name	Description	Acceptance Required?	Responsibility
There are no specific deliverables for this phase; however, the following areas should be discussed and documented:	<ul style="list-style-type: none"> Security requirements for the pattern; Scale requirements for the pattern; Operational requirements for the pattern; Hybrid application requirements for the Customer; and Configure and deploy components to support the Data Sovereignty Hybrid Pattern PoC. 	No	N/A

Module 9: Azure Stack CICD/DevOps Hybrid Pattern PoC

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	The Envision phase includes an envisioning exercise in which the consultant will work with the Customer to identify and verify the use case and the objectives of the PoC.
Customer Activities (The activities to be performed by Customer.)	<ul style="list-style-type: none"> Determine and coordinate the timing of key personnel availability; and Participate in the service kickoff meeting.
Key Assumptions	If this module is selected, then modules 5, 6, 7, and 9 are out of scope.

Deliverables


Name	Description	Acceptance Required?	Responsibility
There are no specific deliverables for this phase; however, the following areas should be discussed and documented:	<ul style="list-style-type: none"> Security requirements for the pattern; Scale requirements for the pattern; Operational requirements for the pattern; and Hybrid application requirements for the Customer. 	No	N/A

2.1.3. Plan and Build

During the Plan phase, the team will develop a detailed plan for the project that includes a list of activities that are to be completed, and the project schedule. In the Build phase, the team will then assist the Customer with hands-on training and in-scope modules.

Module 1: Azure Stack Foundation Core


The Plan and Build phases are focused on educating the Customer on infrastructure aspects of Azure Stack and working with the Customer to either build the expected configuration of its multimodal Azure Stack system (or systems) or by modeling the expected configuration using an Azure Stack Development Kit instance.

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	The following topics will be covered by the consultant during the Plan and Build phases: <ul style="list-style-type: none"> • Azure Stack governance; • Azure Stack billing; • Azure Stack Infrastructure as a Service (IaaS); • Azure Stack Platform as a Service (PaaS); • Azure Stack DevOps introduction; • Azure Stack support; and • Azure Stack deployment patterns.
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> • Participate in the educational sessions; • Make or confirm design decisions about the configuration of the production Azure Stack; and • Participate in the implementation of the Azure Stack configuration that is based on accepted design decisions. The configuration will either be implemented in the deployed Azure Stack multimodal scale units or into a development or test environment through the use of an Azure Stack Development Kit server (this server would be provided by the Customer).
Key Assumptions	<ul style="list-style-type: none"> • The original equipment manufacturer Azure Stack SKU stamp has already been deployed by an entity (partner) not involved in this scope. • An Azure Stack Development Kit instance has already been deployed by the Customer.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Design Decision Spreadsheet	A Microsoft Excel spreadsheet that describes the Azure Stack–related design and configuration decisions made during this phase of the engagement.	No	Microsoft

Module 2: Azure Stack Operations


	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	Microsoft will also conduct a set of interactive educational sessions, focused on Azure Stack Operations, including: <ul style="list-style-type: none"> • The Azure Stack service map; • The Azure Stack service description; • The Azure Stack RACI model; • The Azure Stack monitoring; • The Azure Stack tenant management; • The Azure Stack backup and restore; • The Azure Stack patch and update; • The Azure Stack capacity management; and • The Azure Stack operational tasks.
Customer Activities (The activities to be performed by the Customer.)	The Customer will participate in the workshops to refine the operational practices related to Azure Stack.
Key Assumptions	Azure Stack operational teams will be able to participate in the workshops and make decisions about how to operate Azure Stack.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Stack Service Map	A Microsoft Visio diagram that depicts the Azure Stack environment and its corresponding dependencies.	No	Microsoft
Azure Stack Service Description	A Word Document with a service description of Azure Stack and a definition of the Customer requirements of the service.	No	Microsoft
Azure Stack RACI Model	An Excel spreadsheet that provides an overview of the roles and responsibilities needed to manage and support Azure.	No	Microsoft
Azure Stack Operational Tasks	An Excel spreadsheet that outlines the daily, weekly, monthly, and specific tasks needed to manage Azure Stack.	No	Microsoft

Module 3: Azure Stack Hybrid Networking

The Plan and Build phases are focused on the creation of Azure Resource Manager templates and the building of the Solution in the Customer's environment


	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The following activities will be conducted during the Plan and Build phases by the consultant.</p> <p>Create an Azure Resource Manager template example that:</p> <ul style="list-style-type: none"> • Creates virtual networking components in Azure and Azure Stack. • Creates local network gateways in Azure and Azure Stack. • Configures virtual networking connections in Azure and Azure Stack. • Verifies routing and connectivity. • Deploys the Azure Resource Manager template to the Customer's environment.
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> • Provide the access to Azure and Azure Stack that consultants need to configure and deploy Azure networking components. • The Customer will provide subject matter experts from its networking and firewall and security teams. • Public IP addresses must be provided to support the hybrid Networking pattern.
Key Assumptions	<ul style="list-style-type: none"> • An Azure Stack original equipment manufacturer certified multi-node deployment is required to implement this pattern. • This service scope does not include the use of non-Microsoft VPN gateway such as third-party network virtual appliances. • The Customer should be responsible for the configuration of the network virtual appliance; however, the consultant can update the Azure Resource Manager templates to include the network virtual appliance. <p>This module is required to deliver Geo-Distributed Apps Hybrid Pattern, Cross Cloud Scaling Hybrid Pattern, and the Data Sovereignty Hybrid Pattern.</p>

Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Resource Manager Template	An Azure Resource Manager template that can be used for the deployment of the Azure and Azure Stack hybrid networking component.	No	Microsoft

Module 4: Azure Stack Monitoring and BCDR

The Plan and Build phases are focused on the creation of the Azure Resource Manager Templates and building the Solution in the Customer's environment.


	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The Microsoft Consultant will conduct the following activities during the Plan and Build phase:</p> <p>Work with the Customer to identify the monitoring and BCDR requirements of the Azure Stack tenants and fabric and show the Customer the following capabilities:</p> <p>Tenant Space Monitoring:</p> <ul style="list-style-type: none"> Help the Customer install an Azure Stack monitor PoC on up to 5 virtual machines; Assist the Customer with the deployment of an agent for either SCOM or Azure Monitor (Microsoft Monitoring Agent) on up to 5 virtual machines; Verify reporting into Azure Monitor and/or SCOM dashboard; and Review the Azure Monitor and SCOM Alerts and Notifications with the Customer <p>Fabric Monitoring:</p> <ul style="list-style-type: none"> Deploy the SCOM Azure Stack management pack; Configure the SCOM Azure Stack management pack; and Review the Azure Monitor and SCOM Alerts and Notifications with the Customer. <p>Azure Stack Tenant BCDR:</p> <ul style="list-style-type: none"> Conduct backup and high availability planning for tenant workloads (tenant backup and Azure Site Recovery). <p>Azure Stack Fabric BCDR:</p> <ul style="list-style-type: none"> Conduct Azure Stack backup requirement planning; and Configure the Azure Stack backup process.
Customer Activities (The activities to be performed by the Customer.)	<p>The Customer will:</p> <ul style="list-style-type: none"> Participate in all workshops as required; Provide required access to the monitoring and backup infrastructure as required to complete the scope of work; and Provide required access to Azure and Azure Stack subscriptions.
Key Assumptions	<ul style="list-style-type: none"> The Customer has an operational Azure Subscription. The Customer has an operational SCOM deployment.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Backup Configuration Documentation	Testing and documenting procedures for the backup and availability of tenant workloads.	No	Microsoft

Module 5: Geo-Distributed App PoC

The Plan and Build phases are focused on the creation of Azure Resource Manager Templates and the building of the Solution in the Customer's environment.


	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The following activities will be conducted in the Plan and Build phases by the Microsoft Consultant:</p> <p>Determine Custom Domain for Application:</p> <ul style="list-style-type: none"> Determine early if there will be a need to map a DNS name to the application to be deployed. If the Customer already owns a domain, confirm there is one that can be verified and mapped to the web application. <p>Verify Certificates:</p> <ul style="list-style-type: none"> Verify that there are certificates available that will bind to the application that will be deployed. <p>Deploy a web application to Azure and Azure Stack:</p> <ul style="list-style-type: none"> Use the sample hybrid application Azure Resource Manager template or a custom template created for the Customer and deploy the web application service to Azure Stack. <p>Validate Hybrid connectivity:</p> <ul style="list-style-type: none"> Verify that site-to-site connectivity is functional between to Azure Stack. <p>Configure the Azure Traffic Manager profile:</p> <ul style="list-style-type: none"> Configure Azure Traffic Manager to control how requests from web clients are distributed to apps in Azure App service
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> Help the Microsoft consultant verify that relevant information is available. The Customer needs to provide this information to the Consultant; Work with the Microsoft consultant to identify possible usage of this pattern in its environment. After consulting with the Customer, the Microsoft consultant will update and hand over the Azure Resource Manager template to the Customer; Confirm Azure AD Tenant can consume resources in Azure Stack; Provide DNS domain name that will be used with application; and Provide application certificate if required.
Key Assumptions	<ul style="list-style-type: none"> An Azure Stack OEM certified multi node deployment is required to deliver this pattern. This scenario requires an Azure Stack Web Application that can accessed via the Internet, which means the Azure Stack needs to have routable Public IP address space to the Internet. S2S connection between test Azure Stack and test Azure subscription. The ARM template (Azure Stack to Azure Hybrid Connection with WebApp is used for this PoC is based on the GitHub Template located in https://github.com/Azure/AzureStack-QuickStart-templates/tree/master/sample-hybrid-application/Hybrid-Deployment If this module is selected, then modules 6, 7, 8, and 9 are out of scope.


Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Resource Manager template	An Azure Resource Manager Template example for the Azure Stack geo-distributed App PoC.	No	Microsoft

Module 6: Cross-Cloud Scaling PoC

The Plan and Build phases are focused on the creation of the Azure Resource Manager Templates and the building of the Solution in the Customer's environment.

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The following activities will be conducted in the Plan and Build phases by the consultant:</p> <p>Gather required information and prerequisites:</p> <ul style="list-style-type: none"> • Gather required DNS names and access for cross-cloud scaling. • Work with the Customer to identify networking requirements for IP addressing. • Gather required Secure Sockets Layer certificates for cross-cloud scaling. <p>Update an Azure Resource Manager template to deploy the Solution that must include:</p> <ul style="list-style-type: none"> • Configuration of an SQL backend and App Services. • Configuration and deployment of the web application on Azure and Azure Stack; and • Verification of routing and connectivity; <p>Configure the Azure Traffic Manager profile:</p> <ul style="list-style-type: none"> • Configure Azure Traffic Manager to control how requests from web clients are distributed to apps in Azure App service.
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> • Help the Microsoft consultant verify that relevant information is available. The Customer needs to provide this information to the Microsoft consultant. • Work with the Microsoft consultant to identify possible usage of this pattern in its environment. After consulting with the Customer, the Microsoft consultant will update and hand over the Azure Resource Manager template to the Customer.
Key Assumptions	<ul style="list-style-type: none"> • An Azure Stack original equipment manufacturer certified multi-nodal deployment is required to implement this pattern. • This workstream scope does not include any coding of new functions or the development of web solutions that can be used for the Customer scenario. It is assumed that the Customer already has working function code or a web app that can be used as example for the Customer scenario. • Full access to a test Azure Stack subscription has been granted.


	
Category	Description
	<ul style="list-style-type: none"> Full access to a test Azure subscription has been granted. The Azure Resource Manager template (Azure Stack to Azure Hybrid Connection with WebApp) used for this PoC is based on the GitHub template located at: https://github.com/Azure/AzureStack-QuickStart-Templates/tree/master/sample-hybrid-application. App Service Resource Provider is installed on the Azure Stack environment. SQL Image downloaded to Azure Stack Marketplace. SQL IaaS extension downloaded to Azure Stack Marketplace. A Secure Sockets Layer certificate will be used for the web application. A registered DNS name will be used to access the web application. An S2S connection between the test Azure Stack and test Azure subscription has been established. The Hybrid Networking module is required to deliver the Proof of Concept. If this module is selected, then modules 5, 7, 8, and 9 are out of scope.


Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Resource Manager Template	An Azure Resource Manager template example for the Azure Stack cross-cloud scaling PoC.	No	Microsoft

Module 7: Staged Data Analytics PoC

The Plan and Build phases are focused on the creation of the Azure Resource Manager Templates and the building of the Solution in the Customer's environment.

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The consultant will conduct the following activities during the Plan and Build phases:</p> <ul style="list-style-type: none"> Gather requirements to determine if the current environment is suitable for the Staged Data analytics pattern; Update the storage accounts Azure Resource Manager template; Update the web apps Azure Resource Manager template; Deploy a modified Azure Resource Manager template; Configure Azure and Azure Stack storage accounts; Configure an Azure Stack function; Test the staged data analytics pattern; and Update Azure Resource Manager templates.


	
Category	Description
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> Help the Microsoft consultant verify that relevant information is available. The Customer needs to provide this information to the Microsoft consultant. Work with the Microsoft consultant to identify possible usage of this pattern in its environment. After consulting with the Customer, the Microsoft Consultant will update and hand over the Azure Resource Manager template to the Customer.
Key Assumptions	<ul style="list-style-type: none"> The App Service resource provider has been installed on the Azure Stack environment. Microsoft Consultants have full access to a test Azure Stack subscription. You will need to provide your own data to be processed by the functions. Data must be generated and available to upload to the Azure Stack storage blob container. If this module is selected, then modules 5, 6, 8, and 9 are out of scope.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Resource Manager template	An Azure Resource Manager template example for the Azure Stack staged data analytics PoC	No	Microsoft

Module 8: Data Sovereignty PoC

The Plan and Build phases are focused on the creation of the Azure Resource Manager templates and the building of the Solution in the Customer's environment.


	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The following activities will be conducted during the Plan and Build phase by the Microsoft Consultant:</p> <ul style="list-style-type: none"> • Deploy a database server or database instance to Azure Stack; • Determine whether a new database server needs to be deployed in the Customer's integrated Azure Stack system; • Deploy an Azure web application or a hosted application to Azure; • Use the Azure Resource Manager Template supplied by Microsoft, or create a new Template that the Customer can use to deploy an application service that will connect to a database in the Customer's Azure Stack Region through the S2S VPN that is already in place; • Validate hybrid connectivity; and • Verify that the application that will be deployed in Azure will use a database backend that is in the Customer's Azure Stack region. Backend connectivity between the Web Application and the database server will only occur over the S2S VPN between Azure and Customer's Azure Stack.
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> • Verify that the Microsoft Consultant has access to an Azure account that can create and configure resources in the Customer's Azure Active Directory tenant; and • Verify that the Azure Active Directory tenant can consume resources in Azure Stack.
Key Assumptions	<ul style="list-style-type: none"> • An Azure Stack original equipment manufacturer certified multi-node deployment is already performed by the OEM; • Microsoft Consultants will have necessary accounts permissions for the application database connectivity or service; • Because this scenario requires an Azure Stack web application that can be accessed through the internet, the Azure Stack needs to have a routable public IP address space; • Site-to-site (S2S) connection between Azure Stack and Azure is already configured; and • If this module is selected, then modules 5, 6, 7, and 9 are out of scope.


Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Resource Manager Template	An Azure Resource Manager Template that can be used for the deployment of the Azure and Azure Stack hybrid networking component.	No	Microsoft

Module 9: CICD/DevOps Hybrid Pattern PoC

The Plan and Build phases are focused on setting up and configuring an Azure DevOps workspace that will include Azure DevOps for hybrid CICD and creating repositories and pipelines for infrastructure as code (IaC).

	
Category	Description
Microsoft Activities (The activities to be performed by Microsoft.)	<p>The following activities are conducted in the Plan and Build phases by the Microsoft Consultant:</p> <p>Plan</p> <ul style="list-style-type: none"> • Create a high-level design diagram that describes the overall hybrid CICD pattern and lists the required components; • Work with the Customer to design the repositories, branches, and required build and release pipelines; and • Design the required security model for role-based access control in terms of required roles, groups, user accounts, and service principals. <p>Build</p> <ul style="list-style-type: none"> • Create Azure DevOps Services project and create the organization (as applicable), project, and repositories of the project; • Install Visual Studio Code or Visual Studio 2017 or later and connect to a local repository; • Prepare a private Azure Pipelines agent to be used for Azure DevOps Services integration: <ul style="list-style-type: none"> ○ Create a service principal or use an existing service principal; ○ Create authentication keys for the service principal; ○ Validate the Azure Stack subscription through role-based access control that allows the Service Principal Name (SPN) to be part of the contributor's role; and ○ Create a new service definition in Azure DevOps Services using Azure Stack endpoints and SPN information. • Add an Azure Stack personal access token; • Install the Azure DevOps Services build agent on the Azure Stack–hosted build server; and • Create an Azure Stack endpoint: <ul style="list-style-type: none"> ○ Create an endpoint for Azure Active Directory deployments; and ○ Create an endpoint for Active Directory Federation Services. • Set up API profiles; • Develop your application build: <ul style="list-style-type: none"> ○ Add code to an Azure DevOps Services project; ○ Create a self-contained web app deployment; and ○ Configure the continuous deployment process.

	
Category	Description
Customer Activities (The activities to be performed by the Customer.)	<ul style="list-style-type: none"> • Participate in the design sessions, document creation, and document review; • Facilitate additional meetings with additional experts and stakeholders as determined during the design sessions; • Make the required environmental changes if they have been identified during the design sessions; • Confirm that key personnel have been identified and their time has been allocated; • Make available the required prerequisites such as DevOps instance and security accounts for Microsoft resources for the duration of the project; • Identify and prepare a sample application and infrastructure template that can be deployed through a CICD pipeline; and • Answer questions and provide requested data during implementation.
Key Assumptions	<ul style="list-style-type: none"> • An Azure Stack original equipment manufacturer certified multi-node deployment is already performed by the OEM. • S2S connection between Azure Stack and Azure is already configured. • Any required environmental changes will be made in a manner that supports the overall schedule. Delays in making required changes can affect the overall schedule and require a change order. • The Customer environment is ready for the Plan and Build phases. • The Azure Resource Manager template (Azure Stack to Azure Hybrid Connection with WebApp) used for this PoC is based on the GitHub Template located at: https://github.com/Azure/AzureStack-QuickStart-templates/tree/master/sample-hybrid-application. • If this module is selected, then modules 5, 6, 7, and 8 are out of scope.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Resource Manager Template	<ul style="list-style-type: none"> • Exportable CICD pipelines that will be used to manage the build and release of a sample Azure Resource Manager template; and • Sample ARM Template to deploy a simple IaC solution or a simple web app. 	No	Microsoft

During the Stabilize phase, the team will focus on testing the solution and preparing it for release.

2.1.4. Closure

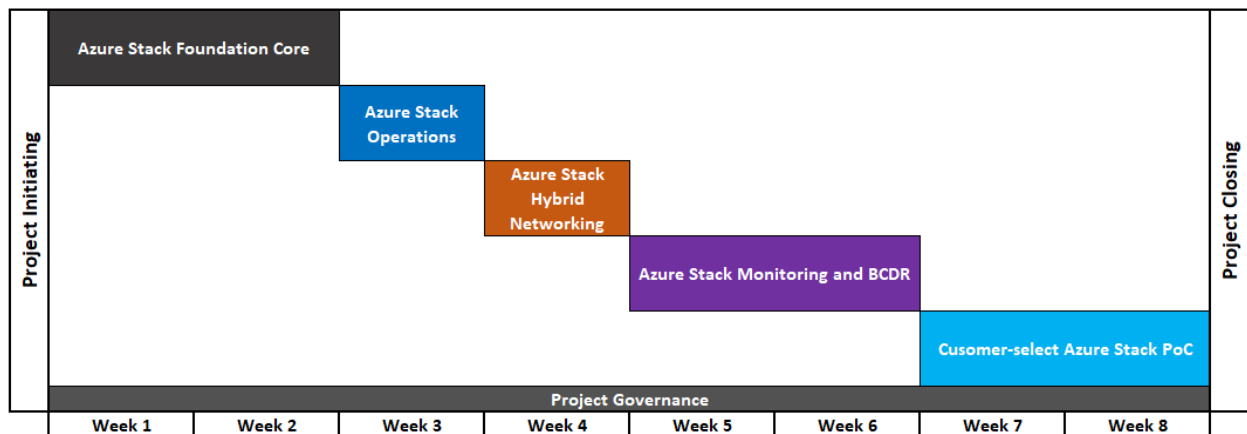
During the Closure phase, the team will close the project and will discuss possible next steps, based on the lessons learned during the Plan and **Error! Reference source not found.** phases. The closeout meeting will be completed after all modules in the Plan and Build phases have been completed.

Deliverables

Name	Description	Acceptance Required?	Responsibility
Azure Stack Foundation Core Executive Summary	PowerPoint presentation with the Azure Stack Foundation Core module executive summary.	No	Microsoft
Azure Stack hybrid Networking Summary Presentation	A PowerPoint presentation that contains the Azure Stack Hybrid Networking module executive summary.	No	Microsoft
Azure Stack Monitoring and BCDR Summary Presentation	A PowerPoint presentation that contains the Azure Stack monitoring and BCDR module executive summary.	No	Microsoft
PoC Summary Presentation	A PowerPoint presentation that contains the PoC executive summary (based on Customer selection).	No	Microsoft

2.2. Timeline

During project planning, a detailed timeline will be developed. The timeline below is a high-level representation, all dates, and durations are relative to the project start date and are estimates only. If the project timeline changes significantly, a Change Request may be issued following the Change Management Process. Customer will select only one PoC that will occur over 10 business days (a two-week period). The total duration of ESI Azure Stack Foundation (ASF) – Large offering is 8 weeks.



2.3. Deliverable Acceptance Process

Microsoft has **no** specific service deliverables requiring formal acceptance.

2.4. Project Governance

The governance structure and processes the team will adhere to for the project are described in the following sections:

2.4.1. Project Communications

The following will be used to communicate during the project:

- **Communications Plan:** This document will describe the frequency, audience, and content of communication with the team and stakeholders. It will be developed by Microsoft and the Customer as part of project planning.
- **Status Reports:** The Microsoft team will prepare and issue regular status reports to project stakeholders per the frequency defined in the communication plan.
- **Status Meetings:** The Microsoft team will schedule regular status meetings, per the frequency defined in the communication plan, to review the overall project status, the acceptance of deliverables, and review open issues and risks.

2.4.2. Risk and Issue Management

The following general procedure will be used to manage active project issues and risks during the project:

- **Identify:** Identify and document project issues and risks (potential issues that could affect the project);
- **Analyze and Prioritize:** Assess the potential impact and determine the highest priority risks and issues that will be actively managed;
- **Plan and Schedule:** Determine the strategy for managing priority risks and issues and identify a resource who can take responsibility for mitigation and remediation;
- **Track and Report:** Monitor and report the status of risks and issues;
- **Escalate:** Escalate to project sponsors the high impact issues and risks that the team is unable to resolve; and
- **Control:** Review the effectiveness of risk and issue management actions.

Active issues and risks will be regularly monitored during the project.

2.4.3. Change Management Process (Contract Modification Process)

During the project, either party may request in writing, modifications to the scope of services described with in this requirement document. Approved modifications will be managed through the contracting office and could lead to additional costs and schedule impacts. These modifications only take effect when the proposed modification is agreed upon by all parties via a Contracting Officer approved task order modification.

The modification management process steps are:

All modification requests will be documented in a mutually agreeable format (modification request form). Microsoft or Customer identified modifications will be submitted to the Contracting Officer. All modification requests must include:

- A description of the modification; and
- The estimated effect of implementing the modification including impact on the project scope, schedule, and labor.

The Contracting Officer will then work with the customer and Microsoft to determine if the modification is within scope of the task order as well as ESI and, if applicable, execute a task order modification.

Any delays due to Customer dependencies or deliverables which may impact project schedule, effort, and cost will be managed by the process outlined in this section.

Microsoft shall have no obligation to commence work in connection with any modification until the details of the modification are approved by the Contracting Officer in a task order modification.

2.4.4. Escalation Path

The Microsoft project manager will work closely with the Customer project manager, sponsor, and other designees to manage project issues, risks, and change requests as described previously. The Customer will provide reasonable access to the sponsor or sponsors to expedite resolution. The standard escalation path for review, approval, or dispute resolution is as follows:

- Project team member (Microsoft or the Customer)
- Project manager (Microsoft and the Customer)
- Microsoft delivery manager
- Microsoft and the Customer project sponsor

2.5. Project Completion

Microsoft will provide services defined in this Requirements Document. If additional services are required, the Change Management Process will be followed, and the contract modified. The project will be considered complete when at least one of the following conditions has been met:

- All Microsoft in-scope tasks have been completed.
- The period of performance (Term) of the project has expired.
- The task order for the project is terminated pursuant to the provisions of the base contract.

3. Project Organization

3.1. Project Roles and Responsibilities

The key project and leadership roles and the responsibilities are as follows.

Customer

Role	Responsibilities
Project Sponsor	<ul style="list-style-type: none"> Is available full time, 30-40 hours a week, at project start and end; Serves part time throughout; Makes key project decisions as needed; and Serves as a point of escalation to support clearing project roadblocks.
Project Manager	<ul style="list-style-type: none"> Is available full time, 30-40 hours a week, throughout project; Serves as the primary point of contact for the Microsoft team; Manages the overall project; Delivers the project on schedule; Takes responsibility for Customer resource allocation, risk management, and project priorities; and Communicates with executive stakeholders.
Technical Team Lead	<ul style="list-style-type: none"> Is available full time, 40 hours a week, throughout project; Serves as the primary technical point of contact; Coordinates efforts with the other technical leads; and Coordinates the implementation activities across all workstreams.
Lead Business Analyst	<ul style="list-style-type: none"> Provide the estimated project commitment part-time, 10- 20 hours a week; Serve as primary functional point of contact for the team that is responsible for functional business analysis of target applications and Services that are envisioned to be hosted on Azure Stack; and Attend the technical workshops.
Application or Workload Lead	<ul style="list-style-type: none"> Provide the estimated project commitment part-time, 10- 20 hours a week; Serve as primary point of contact for the subject area; Share application requirements and define the application infrastructure; Perform the installation and configuration of subject area components; Attend the technical workshops.
Network Lead	<ul style="list-style-type: none"> Provide the estimated project commitment part-time, 10- 20 hours a week; Serve as primary point of contact for the subject area; Manage and perform the installation and configuration of subject area components; and Attend the technical workshops.
Storage Lead	<ul style="list-style-type: none"> Provide the estimated project commitment part-time, 10- 20 hours a week; Serve as primary point of contact for the subject area; Manage and perform the installation and configuration of subject area components; and Attend the technical workshops.
Security Lead	<ul style="list-style-type: none"> Provide the estimated project commitment part-time, 10- 20 hours a week; Serve as primary point of contact for the subject area; Manage and perform the installation and configuration of subject area components; and Attend the technical workshops.

Role	Responsibilities
Active Directory Lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the technical workshops.
Operations lead	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time, 10- 20 hours a week; • Serve as primary point of contact for subject area; • Manage and perform the installation and configuration of subject area components; and • Attend the operations workshops.

Microsoft

Role	Responsibilities
Account Delivery Executive	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; • Drives delivery governance and operational excellence; and • Serves as a single point of contact for escalations, billing issues, personnel matters, and contract extensions.
Project Manager	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; • Manages and coordinates Microsoft project delivery; • Is responsible for issue and risk management, change management, project priorities, status communications, and status meetings; • Collaborates with the Domain Solution Architect(s) to manage scope and customer expectations; • Coordinates Microsoft and Microsoft subcontractor resources but not customer resources; and • Optionally delivers Project Management remotely.
Microsoft Azure Architect	<ul style="list-style-type: none"> • Provide the estimated project commitment part-time; • Lead the Solution Alignment Workshops (SAW) and select SAW modules. • Assist with Azure configuration and other Solution build activities; • Assist with Solution testing; and • Support the Solution walk-through.
Microsoft Azure Consultant	<ul style="list-style-type: none"> • Provide the estimated project commitment full-time; • Lead select SAW modules; • Lead Azure configuration and other Solution build activities; • Lead Solution development activities; and • Lead Solution testing and walk-through.

4. Customer Responsibilities and Operational Standards

4.1. Customer Responsibilities

In addition to Customer activities defined herein, the Customer will also be required to:

- Provide information:
 - This includes accurate, timely (within three (3) business days or as mutually agreed-upon), and complete information required for the engagement.
- Provide access to people and resources:
 - This includes access to knowledgeable customer personnel, including business user representatives, and access to funding if additional budget is needed to deliver project scope.
 - Identify key personnel (stakeholders, decision makers, architects, and subject matter specialists) who can participate in the workshops, design sessions, and testing activities described in the **Error! Reference source not found.** section:
 - Confirm key personnel availability and coordinate their participation.
 - Key personnel will attend workshops and design sessions, will provide requirements, and participate in the discussions and decision making:
 - Key personnel identified to participate must be empowered to make decisions on behalf of the organization, and to engage with and coordinate with other teams.
- Provide access to systems:
 - This includes access to all necessary customer work locations, networks, systems, and applications (remote and onsite).
- Provide a work environment:
 - This consists of suitable workspaces, including desks, chairs, and Internet access.
- Manage non-Microsoft resources:
 - The Customer will assume responsibility for the management of all customer personnel and vendors who are not managed by Microsoft.
- Manage external dependencies:
 - The Customer will facilitate any interactions with related projects or programs to manage external project dependencies.

4.2. Operational Standards

The project scope, services, labor, timeline, and our detailed solution are based on the information provided by the Customer to date. During the project, the information and dependencies in this document will be validated, and if a material difference is present, this could result in Microsoft initiating a Change Request to cover additional work or extend the project duration. In addition, the following operational standards have been made:

- Customer resource availability and dispatch may affect timelines.
- Microsoft resources will be mobilized up to four weeks from the date of the Task Order signature.
- If work is interrupted, the activities may be resumed once requested and agreed to by Microsoft. In this case Microsoft may require up to six weeks to mobilize the resources and have the complete

project team in place. In this situation Microsoft cannot guarantee that the team members will be the same team members who worked previously in the project.

- Microsoft will engage specific resources as deemed necessary by Microsoft to support a specific technical area. This could require multiple individuals engaged to support the engagement, based on technical specialty.
- Any Customer-caused delay in providing required information, supporting artifacts, or conducting requisite activities could result in schedule impacts that would require modification of the existing Task Order and subject the Customer to increased costs for delivery.
- Customer Lab and / or development facility is available as required.
- Customer agrees that Microsoft may associate Customer's Online Services with Professional Services accounts through configuration of the Customer's subscriptions or Azure resources.
- Customer is ultimately responsible for the Assessment and Authorization (A&A) process or any documentation that is required to support an Authority to Operate (ATO) package.
- Per Section 2.1, Customer can only execute one of the following two-week Proof of Concept (PoC) workstreams as (also referred to as Module 5, Module 6, Module 7, Module 8, and Module 9) defined in this document as part of this project:
 - Geo-distributed applications
 - Cross-cloud scaling,
 - Staged data analytics
 - Data Sovereignty
 - Continuous Integration/Continuous Deployment (CICD)/DevOps hybrid pattern

The selection is to be made during the Envision Phase as noted in Section 2.1.2.